
RTI Software[®] 5.0

System Administration Manual

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Section 1



Overview



Section 1



Overview



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System Administration

The System Administration module is primarily used to maintain your departments and personnel, security, definition of field values, set-up options, vendors, and specific account related information. It is also used to perform specific database related functions, and to monitor usage.

Some of the functionality available in the System Administration module can also be accessed through *CustomerFirst* and/or *SalesFirst*. For example, the product information, customer and contact information, and escalation rules.

Specific features addressed in this manual are separate executables, and are not actually part of the System Administration executable.

System Administration Menu Choices

File	Administration	Personnel
<u>N</u> ew>	Account	Automatic E-mail <u>M</u> essages
	Equipment	<u>C</u> ountry List
	<u>V</u> endor	Maintain <u>C</u> odes/Code Types
<u>O</u> pen>	<u>A</u> ccount...	Object Access Security
	<u>C</u> ontact ...	Set-up Defaults
	Equipment...	Copy Screen Customization between User <u>G</u> roups
	<u>V</u> endor...	<u>U</u> ser Group Preferences
	<u>L</u> icense...	User and <u>L</u> icense Info
	Maint. Contarct...	Account <u>r</u> elated > Account <u>T</u> ypes
	Product <u>F</u> amily Maintenance...	<u>M</u> aintain Account
	Equipment Models	Maintenance Contract <u>T</u> ypes
	<u>E</u> scalation Rule	Characteristics > <u>D</u> efine Types and Values
	File <u>D</u> ownload Manager	<u>M</u> ove/Merge Values
	<u>G</u> roup	<u>G</u> enerate Values for Incidents
	<u>P</u> roduct	Database Related > <u>D</u> efine Database Keys
	Task <u>T</u> emplate	Maintain <u>E</u> scalation Triggers
<u>C</u> lose	Ctrl+F4, F3	Maintain <u>T</u> able/Column Info
<u>R</u> efresh	F5	Archive <u>P</u> roduct Version
<u>S</u> ave	Ctrl+S, F12	<u>R</u> estore Archived Data
<u>S</u> ave/New	F2	TechSearch Setup
<u>S</u> ave <u>A</u> ll		
<u>P</u> rint	Ctrl+P	
<u>S</u> end...		
<u>D</u> ial...		
<u>A</u> lerts>	Alert <u>L</u> ist	
	Alert <u>M</u> aintenance	
	Alert <u>O</u> ptions	
	<u>S</u> chedule Alert	
<u>E</u> xit		

Queries	Tools	Window	Help
Ad-hoc <u>S</u> earch >	Account Search	<New Tool>	<u>R</u> efresh F5
	<u>A</u> udit TrailSearch	User Setup	<u>C</u> ascade
	<u>C</u> ontact Search	<u>S</u> pell Checking Options	Tile <u>H</u> orizontally
	Email History Search	Reports	Tile <u>V</u> ertically
	<u>E</u> quipment Search	<u>T</u> race	Close <u>A</u> ll
	<u>F</u> ile Download Search	<u>D</u> efine Tools	Show List
	<u>L</u> icense Search		Show List <u>T</u> arget
	<u>M</u> aint. Contract Search		<u>P</u> rior in List
	<u>M</u> aint. Contract Charges Search		<u>N</u> ext in List
	<u>W</u> ebFirst Logon Search		
	<u>A</u> dvanced Ad-Hoc Search		
<u>L</u> ayout Changes			
List of all <u>F</u> orms			
Accounts <u>H</u> aving Refresh			
<u>R</u> eturned Equipment			

System Executables

The RTI product suite has various executables that provide specific functionality. Some of the following executables are used on a regular basis while others are used as needed for administrative purposes. Each executable can be presented as an icon on the appropriate workstation(s). Each executable can also be executed directly from the directory that contains the product code.

- **CustomerFirst** (CFS.exe)
Contains Incident Handling, Problem Tracking and Resolution, the Alerts function, Queries, and Inventory Management (if applicable).
- **CustomerFirst Java** (CFSJW.exe)
The Java version of *CustomerFirst* that contains Incident Handling, Problem Tracking and Resolution, the Alerts function, Queries, and Inventory Management (if applicable).
- **SalesFirst** (SLS.exe)
Contains Account Information, Product Related Information, Competitor Information, Lead Sources, Sales Tracking, and Online Queries.
- **SalesFirst Java** (SLSJW.exe)
The Java version of *SalesFirst* that contains Account Information, Product Related Information, Competitor Information, Lead Sources, Sales Tracking, and Online Queries.
- **WebFirst Java** (WFSJW.exe)
The Java version of *WebFirst* that allows your customers to access the database to enter new incidents, view existing incidents, search the knowledge base, and download files.
- **System Administration** (ADM.exe)
Used to complete administrative functions within the system. Departments and personnel, security, vendors, specific account information, field values, setup options, etc. are maintained using this executable.
- **WebFirst Administration** (WFS.exe)
Used to complete panel and list box customization for *WebFirst* users. This also includes creating forms for use in *WebFirst*.
- **Application Server** (APPSRV.exe)
Used to allow Java access to *CustomerFirst/SalesFirst*. This executable is also used if accounts are accessing *WebFirst* as an application.
- **Escalation Server** (ESSERVER.exe)
Performs specific actions for objects based on your defined escalation rules.
- **Incoming Mail Server** (INMAIL.exe)
Allows new contact activities and sales opportunities, new incidents, and activities for existing incidents, problems, and sales opportunities to be entered into the system via e-mail.
- **Service Manager** (SVCMMGR.exe)
Allows you to run the Escalation Server, Inmail Server, and Application Server and as services under Windows NT or Windows 2000.

- **Status Monitor** (SRVCHECK.exe)
Allows you to monitor the status of the Inmail Server and Escalation Server.
- **Data Generation for Pivot Tables** (DATAGEN.exe)
Generates the summary data for use in the Pivot tables.
- **Data Import** (RTIIMP.exe)
Used to import data into the system using the standard imports.
- **Installation Manager** (RTIUPG.exe)
Used when upgrading to a new release of the product.
- **License Manager** (RTILIC.exe)
Used to enter the license key for each module you have purchased from RTI.
- **Sql Loader** (RTILOAD.exe)
Only used when directed by RTI to execute specific SQL scripts.
- **Administrative User** (ADMUSER.exe)
Used only by system administrators to log into the system when all licenses are being used. This executable only has access to the User and License Information panel and does not use a license.

Database Setup Overview

Installation Instructions

Installation instructions are provided with your system.

Loading Tables

Data can be loaded manually into the tables following the sequence described below and the instructions for each area in the following sections of this manual. Alternatively, some data can be imported. Most imports are written so they can be run to initially load new data and then subsequent imports can be run daily or weekly to update the data. See the Import Programs section of this manual for information about the standard import programs.

Sequence for Loading Data

The RTI Software System Administration class covers database set-up. This manual is provided as a supplement to the training class and is not a substitute for training.

The database should be set-up in a sequence similar to the following. However, the related codes will typically be defined as you move through each item.

- Indicate which tables should be audited. (*CustomerFirst & SalesFirst*)
- Define the codes to be used by all other tables. (*CustomerFirst & SalesFirst*)
- Define countries. (*CustomerFirst & SalesFirst*)
- Define account types. (*CustomerFirst & SalesFirst*)
- Define lead sources. (*SalesFirst*)
- Define the user classes and User Class security for each panel. (*CustomerFirst & SalesFirst*)
- Define the user groups for screen customization and other user group related options. (*CustomerFirst & SalesFirst*)
- Define the departments and personnel who will be using the system. (*CustomerFirst & SalesFirst*)
- Define products. (*CustomerFirst & SalesFirst*)
- Define equipment vendors (only with Inventory Management option). (*CustomerFirst*)
- Define equipment types and models (only with Inventory Management option). (*CustomerFirst*)
- Define equipment (only with Inventory Management option) that you will be supporting either at account sites or internal departments. (*CustomerFirst*)

- Define sales competition. (*SalesFirst*)
- Define accounts. (*CustomerFirst & SalesFirst*)
- Define contacts. (*CustomerFirst & SalesFirst*)
- Define products shipped to accounts. (*CustomerFirst*)
- Define CPUs at account locations. (*CustomerFirst & SalesFirst*)
- Define licenses for accounts. (*CustomerFirst & SalesFirst*)
- Define maintenance types. (*CustomerFirst & SalesFirst*)
- Define maintenance contracts. (*CustomerFirst & SalesFirst*)
- Define system defaults. (*CustomerFirst & SalesFirst*)
- Define user group defaults. (*CustomerFirst & SalesFirst*)
- Define characteristic types and values. (*CustomerFirst*)
- Define escalation triggers. (*CustomerFirst & SalesFirst*)
- Define escalation rules. (*CustomerFirst & SalesFirst*)
- Define options for the Escalation Server. (*CustomerFirst & SalesFirst*)
- Define forms for automatic E-mail messages and/or inactivate messages if appropriate. (*CustomerFirst & SalesFirst*)
- Define options for the Inmail Server. (*CustomerFirst & SalesFirst*)
- Customize the panels, pop-ups, and list boxes as required. Refer to the Screen & List Box Customization section of this manual.

An overview of each step is described below. Refer to the appropriate manual for a discussion of the specific screens to be used for each of the following steps.

Audit Trail

There is audit trail functionality within the system that allows you to identify what data was modified, when it was modified, and who performed the update. You can indicate which tables you want to be audited. You can access the information through the Audit Trail Search. Refer to the Other Administrative Functions section in this manual.

Codes

Code values are used to populate many of the drop down fields on panels and pop-up boxes. Some code values have been predefined and others can be user defined. Each code value requires an Internal Value. Some of the internal values cause specific actions to take place. In most cases, you can use these internal values when you define new codes in order to cause these actions to occur. In some cases, there are restrictions on the internal values that you are permitted to use. Review the codes that impact processing or have restrictions due to system processing logic. Code values must be defined before they can be selected on a panel or pop-up box. Refer to the Define Field Values section in this manual.

Countries

Countries are used in several places within the system. You must define countries before you enter Departments, Personnel, Accounts, and Contacts. Refer to the Define Field Values section in this manual.

Account Types

Account types can be defined to categorize your accounts and to identify if the system should check for a valid maintenance contract when an incident is entered. Refer to the Define Field Values section in this manual.

Lead Sources

Lead sources can be defined to identify how you became aware of an account and how the account became aware of your organization. One or more lead sources can be associated with the following:

- Account
- Contact
- Sales Opportunity

In addition, a lead source can be associated with a campaign phase. If a sales opportunity is created from a campaign phase that has a lead source, the *Lead Source* from the campaign phase will be automatically added to the sales opportunity.

Lead sources are maintained from *SalesFirst*, not from System Administration. For more information about defining lead sources, refer to the Define Field Values section in this manual.

Security

When a person is identified as a user within the system, the user's access to panels, fields, objects, and particular actions is primarily defined by security related options within the system. However, in some situations a user's access is system defined. The following elements may be used to control a user's access:

- User Class (Screen access, object access, code values, and products)
- User Group (Field access, code values, products, and specific options)
- Department (Code values and products)
- User
- System Wide Access Related Options in Set-up Defaults
- System Defined Rules

For additional information, refer to the Security section in this manual.

Departments and Personnel

Departments are the departments within your organization. A department can also be defined as a queue for the assignment of specific objects. For example, a department of 'Enhancements' might be defined for the purpose of assigning all enhancement requests to this queue until they are ready to be assigned elsewhere.

Departments can be grouped by a Department Type for searching and reporting purposes. Certain department types are also used for specific processing. Refer to Code Values in the Define Field Values section of this manual.

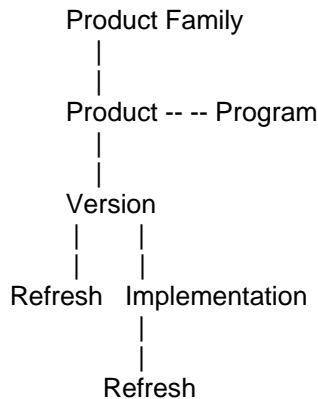
Personnel are typically people within your organization. Personnel can be imported or entered manually.

All departments and personnel that are added will be automatically added as accounts and contacts. This allows internally reported issues to be logged for the department and user who reported it.

For additional information, refer to the Departments & Personnel section of this manual.

Products

Products can refer to actual products or services. Products can be defined based on the following elements:



Products are used in the following places within the system:

- Sales Opportunity – *Product*
- Sales Forecast – *Product Family* and *Product*
- Account License – *Product* and *Implementation*
- Account Maintenance Contract – *Product* and *Implementation*
- Account Shipped Products – *Product*, *Version*, *Implementation*, *Refresh*
- Account Customized Products – *Product* and *Program*
- Account Contact Types – *Product*
- Incident – *Product Family*, *Product*, *Version*, *Implementation*, *Refresh*
- Problem – *Product Family*, *Product*, *Version*, *Implementation*, *Refresh*
- Permanent Fix – *Product*, *Version*, *Implementation*
- Task – *Product*

In defining products you must decide what to call a product. Some of the items that you sell will clearly be products. Others, such as significant options, can be defined as products if desired. Defining them as separate products ensures that problems with them will be categorized separately. However, you can also categorize these issues by treating the options as subsystems of the product. You would then record the subsystem for each problem using another field. Products can be imported or entered manually.

For additional information, refer to the Products & Equipment section of the *CustomerFirst* Reference manual or the Products section of the *SalesFirst* Reference manual.

Equipment Vendors

This is only applicable if you have purchased the Inventory Management module. Vendors must be defined to identify the manufacturers, purchasing vendors, and repair vendors. Refer to the Products & Equipment section of this manual.

Equipment

This is only applicable if you have purchased the Inventory Management module. Equipment can be imported or entered manually. Define the appropriate equipment types using the Maintain Codes/Code Types panel in System Administration. Define the models for each equipment type using the Define Equipment Models pop-up box in *CustomerFirst*. Equipment can be recorded that is in inventory, at account sites, or assigned to a user within departments in your company. For additional information refer to the Products & Equipment section of the *CustomerFirst* Reference manual.

Sales Competitors

You can define competitors to indicate who you are competing against for the sale of your product(s) to an account. Competitors can be identified for an account or a specific sales opportunity. Competitors are maintained from *SalesFirst*, not from System Administration. Refer to the *SalesFirst* Reference Manual.

Accounts

Accounts can represent headquarters operations, sites, or both. When both are represented, sites can be related to the headquarters by recording the Parent account for each site. In addition, accounts can be associated with a specific Reseller if appropriate. Accounts should represent the lowest level at which you are interested in knowing who reported an issue or licensed your product. Accounts can be imported or entered manually. Refer to the Accounts & Contacts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

Contacts

Contacts represent individuals at an account site. A contact can be identified on a sales opportunity, incident, activity, maintenance contract, and piece of equipment. If contacts at a headquarters (Parent Account) report issues that occur at child sites, the contacts can be recorded only once at the parent account and referenced from the child sites of that parent. If you are an internal help desk, contacts are the users within the departments or remote sites that you are supporting. Contacts can be imported or entered manually. Refer to the Accounts & Contacts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

Product Releases Shipped to Accounts

You can identify what products and releases have been sent to an account. Shipped product information can be imported or entered manually. Refer to the Accounts & Contacts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

Hardware Configurations at Account Sites

The Account CPUs tab is provided to track configurations at account sites. This information may be required if you license your software products to run on specific CPUs, to dial-up to account's CPUs for diagnostic purposes, or just for informational purposes. If you are supporting and repairing hardware, the Inventory Management module provides the facilities you need for tracking RMAs,

warranty information, and repair frequency. Refer to the Accounts & Contacts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

License Information

You can identify which products and/or services are licensed for a specific account. Define the appropriate license types using the Maintain Codes/Code Types panel in System Administration. License information can be imported or entered manually. Refer to the Accounts & Contacts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

Maintenance Contract Types

Contract types must be defined before a contract can be entered. Refer to the Define Field Values section of this manual.

Maintenance Contracts

The maintenance contract facility allows you to track specific contract agreements that you have with your accounts. Incidents can then be associated with a particular contract to track the activity performed against the contract. Contract information can be imported or entered manually. Refer to the Maintenance Contracts section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual.

System Set-Up Defaults and User Group Defaults

You can select a number of options at a system level and others at a User Group level. Refer to the Other Setup Options section of this manual.

Incident Characteristics

The purpose of characteristics is to define values which describe an incident and can be used to build an indexed knowledge base of information. Characteristics consist of Characteristic Types and Characteristic Values which are user defined. Characteristic Types are categories of values. Refer to the Incident Characteristics section of this manual.

Escalation Triggers and Rules

The escalation facility helps you to manage workflow and notify individual users or departments of situations that should be addressed. Escalation rules are defined using the Define Escalation Rule panel and are evaluated and executed by the Escalation Server. You can pre-select intervals for the system to examine changes that have been made to the database. Refer to the Escalation section of this manual.

Automatic E-mail Messages

For specific user actions automatic e-mail messages are generated by the system. You can customize the e-mail messages that are sent by the system. You can also turn off specific messages. Refer to the E-mail & Incoming Mail Server section of this manual.

Incoming Mail Server

Through an incoming e-mail message you can accomplish the following using the Incoming Mail Server:

- Add a contact activity
- Add a new sales opportunity
- Add a new incident
- Add an activity for an existing sales opportunity
- Add an activity for an existing incident
- Add an activity for an existing problem
- Change the Status of an existing incident

Refer to the E-mail & Incoming Mail Server section of this manual for additional information about the setup requirements and options.

Screen and List Box Customization

The panels and pop-up boxes used within the system can be customized to satisfy specific requirements for your organization. Base menu options and tool bar icons can be relabeled or removed, tabs can be renamed or hidden, field labels can be changed, fields can be moved, disabled, or hidden, and user labels can be added. All screen customizations are defined by *User Group*. Screen customizations can be copied between user groups. Refer to the Screen & List Box Customization section of this manual.

Section 2



Security



Section 2



Security



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Overview

When a person is identified as a user within the system, the user's access to panels, fields, objects, and particular actions is primarily defined by security related options within the system. However, in some situations a user's access is system defined. The following elements may be used to control a user's access:

- User Class

A user is assigned to a specific *User Class*. The *User Class* can be used to control the following:

- Access to specific panels, tabs, and pop-up boxes
- Access to specific objects
- Which values can be selected in product fields
- Which values can be selected in code fields
- Where objects can be transferred to

It should be noted that the *User Class* is a code field.

- User Group

A user is assigned to a specific *User Group*. The *User Group* can be used to control the following:

- Access to specific tabs, fields, and base menu options and tool bar icons
- Access to specific objects based on *Product*, account *Sales Status* or *Problem Type*
- Which values can be selected in product fields
- Which values can be selected in code fields
- Where objects can be transferred to
- Other access related options

It should be noted that the *User Group* is a code field.

- Department

A user is assigned to a specific *Department*. The *Department* can be used to control the following:

- Access to specific objects based on the *Owner/Assignee* of the object
- Which values can be selected in product fields
- Which values can be selected in code fields
- Where objects can be transferred to

- Individual User

Some access is defined at an individual user level.

- Access to modify the *User ID* and *Password*
- Access to the Alternate Customer Selection pop-up box

- Access to the Outlook Calendar interface
- Access to the telephony interface
- Access to *TechSearch*
- Access to the PVCS or SourceSafe interface

- System Wide Access Related Options in Set-up Defaults

- System Defined Rules

In some situations the user's access is controlled by system defined rules within the application.

User Classes

A User Class is primarily used to define specific access to the panels, tabs and pop-up boxes, and object access. Typically user classes are associated with certain roles or job responsibilities in the organization. One or more persons may be assigned to a specific user class.

User classes are used in the following places within the system:

- User Privileges panel where you define the access to panels, tabs and pop-up boxes for each user class
- Object Access Security panel where you define access to specific objects by user class
- Value Security pop-up from the Product Information panel where you can control selection of specific products by user class, and object access based on the product
- Value Security pop-up box in Maintain Codes where you can control selection of specific code values by user class, and object access based on account *Sales Status* or *Problem Type*
- Transfer/Reassign Security tab in Set-up Defaults where you can control where objects can be transferred or reassigned by user class
- Specific processing may be performed based on the *Internal Value* of the user class

Adding a New User Class

A user class is defined through the Maintain Codes/Code Types panel. A number of values have been provided with the system but each company can further define the appropriate user classes for their organization. Refer to the Define Field Values section of this manual for more information.

Internal Processing Related to the User Class

<u>Internal Value</u>	<u>Impact</u>
OPER	Used to classify non-support personnel who will be logging incidents from accounts. The <i>Account</i> and <i>Contact</i> fields for a new incident opened by this user will initially be blank. Incidents opened by a person with this user class will have a default <i>Status</i> of 'INIT' and the <i>Owner</i> of the incident will default to the default department.
SUPRT	Used to indicate that users with this user class will typically be logging incidents reported by accounts. The <i>Account</i> and <i>Contact</i> fields for a new incident opened by this user will initially be blank.
WFS	Used to for identifying different user classes for your accounts that are using <i>WebFirst</i> .

Assignment of a User Class

- Company Personnel panel where you can assign a user to a specific user class
- Account Information panel where you assign an account to a specific user class for access through *WebFirst*
- Account Contact panel where you assign a contact to a specific user class for access through *WebFirst*

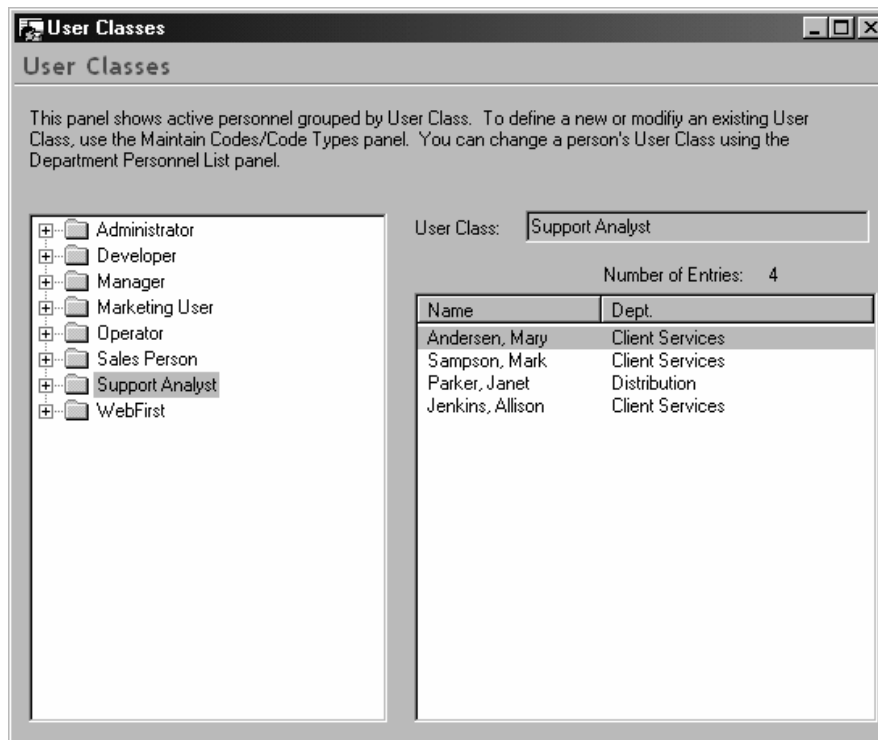
User Classes Panel

This panel displays the defined user classes and which personnel are assigned to each class. No entry is allowed on this panel.

Access

You can access this panel by selecting *Personnel* and *User Classes* from the menu bar.

Panel Layout



Panel Elements

Value Tree

Displays a hierarchal list of each *User Class* and the personnel assigned to that user class.

Personnel List

Displays a list of the personnel assigned to the *User Class* highlighted in the value tree.

User Privileges Panel

The access rights to panels, tabs and pop-up boxes for each user class are defined on the User Privileges panel. The security access for all user classes for all panels, tabs, and pop-up boxes initially defaults to 'UPDATE'. The only exception is the Administrative user class. The security access for this user class defaults to 'ADMIN'.

Access

You can access this panel by selecting *Personnel* and *User Privileges* from the menu bar.

Panel and Pop-up Box Security Levels

There are four levels of security:

- ADMIN

The user has standard update access to the panel, tab, or pop-up box as well as additional privileges for specific panels and pop-up boxes.

- The user can update and/or delete all 'Public' forms if they have ADMIN access to the Define Forms panel.
- The user can update and/or delete saved queries if they have ADMIN access to the specific query panel.
- The user can update and/or delete saved list box customizations if they have ADMIN access to the specific panel.
- The user can update and/or delete group information if they have ADMIN access to the Group Information panel.
- The user can access any time summary information if they have ADMIN access to the Department Time Summary panel panel.
- The user can perform all types of forecasts in *SalesFirst* if they have ADMIN access to the Sales Forecast panel.
- The user can clear the *Notify Owner/Assignee Flag* if they have ADMIN access to the Incident, Problem, or Sales opportunity panel.

- UPDATE

The user has standard update access to the panel, tab, or pop-up box. If there are *Public/Private* options, the user can only update the items that they created.

- READ

The user has read only access to the panel, tab, or pop-up box.

- NONE

The user has no access to the panel, tab, or pop-up box. The associated menu options will be disabled.

Privileges for Related Tabs on a Panel

On some panels, several of the tabs are tied together for screen customization purposes and cannot be controlled individually through User Privileges. For example, you cannot define different access for the Main, Details, and Miscellaneous tabs on a panel, or the criteria tabs on the search panels. The tabs will not be displayed individually in User Privileges. For a panel that has a Main, Details, and Miscellaneous tabs, you will see 'Main and Related' as the tab name. For the search panels, you will see a single 'Criteria' tab name.

However, through screen customization you can hide a specific tab for a *User Group*.

Multiple Panels with Similar Information

Some access is related to more than one panel and you must define the access in both places. For example, the Contracts tab of the Account Information panel and the Maintenance Contract panel.

Copying Privileges from One User Class to Another

You can copy the privileges that have been defined for one user class to another user class. This feature is often used when defining privileges for user classes that have many of the same privileges.

Menu Bar Choices

Maintain Privileges

Copy Privileges between User Classes

Copy Privileges between User Classes

Displays the Copy Security Between User Classes pop-up box to allow a user to copy the privileges that have been defined for one user class to another user class.

Common Panel Elements

Button Controls

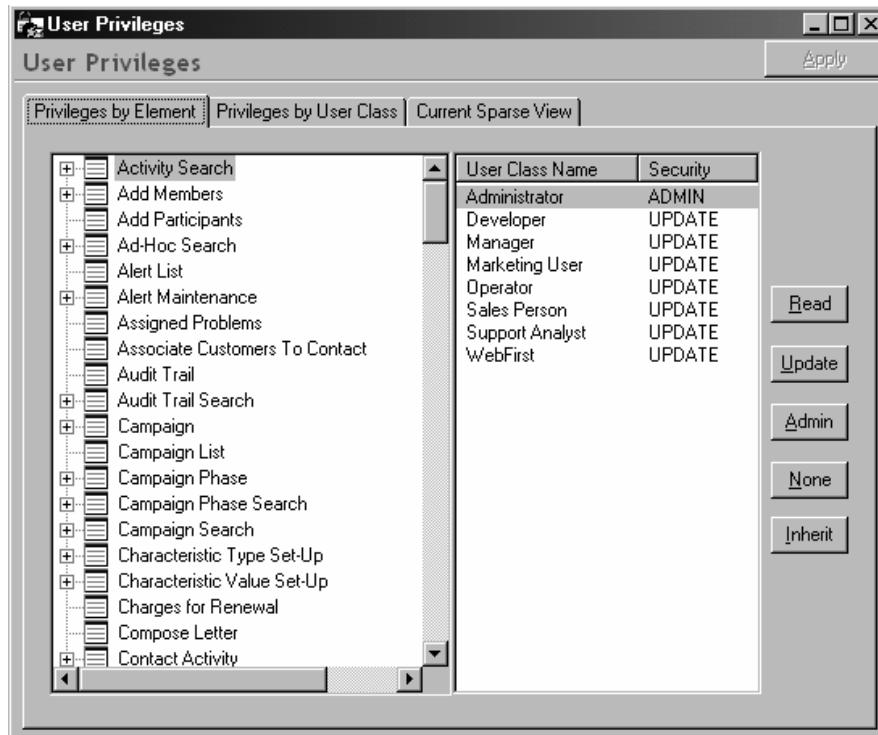
Apply

Applies the security changes to your machine's memory. Security settings are cached in memory. If you do not use this button, you need to log out of *CustomerFirst* and log back in for the changes to take effect.

Privileges by Element Tab

This tab is used to define access for one or more user classes by panel, tab and/or pop-up box. You can select a specific panel, tab, or pop-up box, and then change the access for one or more user classes.

Panel Layout



Panel Elements

Panel Title (UC_Security40.Element_Id)
The title of the panel, tab, or pop-up box. Security will be modified for the highlighted item.

User Class Name (UC_Security40.User_Class_Id)
The name of the User Class. Security for the highlighted user classes will be modified.

Security (UC_Security40.Security_Level_Id)
The level of security that applies to the selected panel, tab, or pop-up box for each User Class.

Button Controls

Read
Sets READ level security for the selected user classes.

Update

Sets UPDATE level security for the selected user classes.

Admin

Sets ADMIN level security for the selected user classes.

None

Sets NONE level security for the selected user classes.

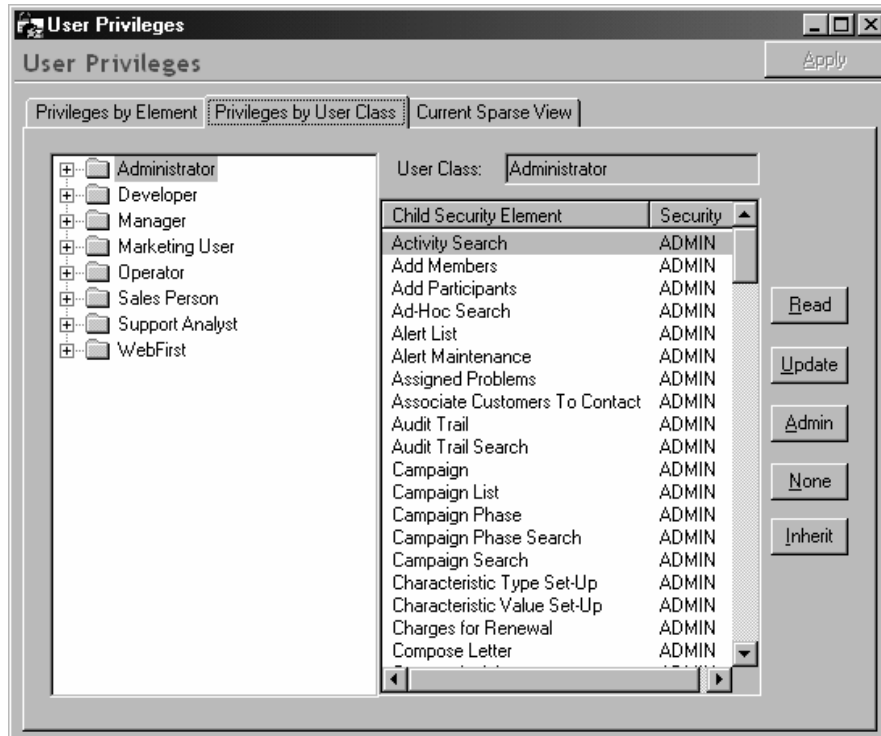
Inherit

Copies the security for the higher level panel. For example, if a pop-up box is highlighted, the security from the tab above it will be inherited by the pop-up box. Tabs will inherit the security from the panel. If you are at the highest level, security will be set back to the default.

Privileges by User Class Tab

This tab is used to define access for one or more user classes by User Class. You can select a User Class, and then change the access for one or more panels, tabs, or pop-up boxes.

Panel Layout



Panel Elements

User Class (UC_Security40.User_Class_Id)

The name of the user class. Security will be modified for the highlighted User Class.

Panel Title (UC_Security40.Element_Id)

The title of the panel, tab, or pop-up box. Security for the highlighted items will be modified.

Security (UC_Security40.Security_Level_Id)

The level of security that applies to the selected User Class for each panel, tab, or pop-up box.

Button Controls

Read

Sets READ level security for the selected panels, tabs, or pop-up boxes.

Update

Sets UPDATE level security for the selected panels, tabs, or pop-up boxes.

Admin

Sets ADMIN level security for the selected panels, tabs, or pop-up boxes.

None

Sets NONE level security for the selected panels, tabs, or pop-up boxes.

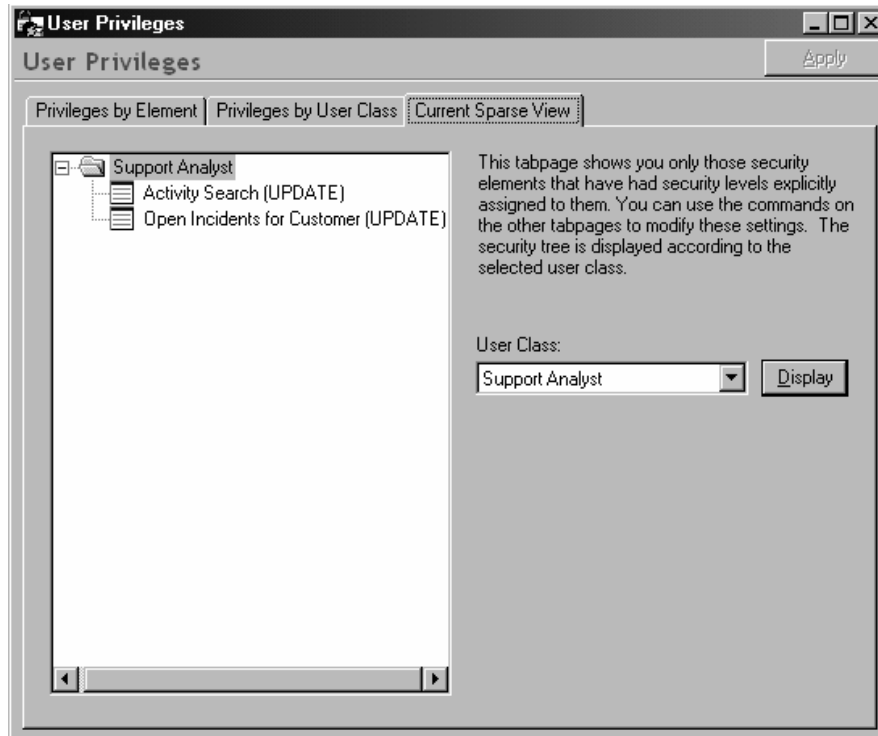
Inherit

Copies the security for the higher level panel. For example, if a pop-up box is highlighted, the security from the tab above it will be inherited by the pop-up box. Tabs will inherit the security from the panel. If you are at the highest level, security will be set back to the default.

Current Sparse View Tab

For the user class selected in the *User Class* field, any security settings that differ from the defaults will be displayed.

Panel Layout



Panel Elements

User Class

The name of the user class.

(UC_Security40.User_Class_Id)

Button Controls

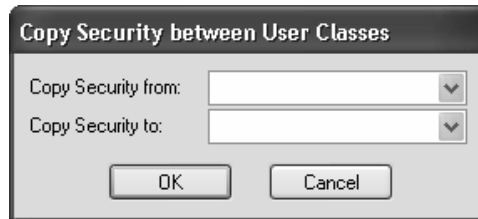
Display

Displays a list of security settings that differ from the default for the selected User Class.

Copy Security between User Classes Pop-Up Box

This pop-up box allows you to copy security from one User Class to another User Class.

Pop-Up Box Layout



Pop-Up Box Elements

Copy Security from

The User Class selected in this drop down will be used as the source for the user privileges to be copied to another User Class.

Copy Security to

The User Class selected in this drop down will be used as the target for the user privileges levels from the source User Class.

Button Controls

OK

Copies the privileges and closes the pop-up box.

Cancel

Closes the pop-up box without copying the privileges.

Object Access Security (Available in later release of 5.0)

An object is a set of related tables representing an Account, Incident, Problem, Sales Opportunity, or Campaign Phase. Panel level security can be used to prevent a user from accessing or updating all objects of a specific type. Object level security is used to limit a user's access to specific instances of an object type. For example, a user could be limited to only access incidents owned by the user's department, and only update those incidents that the user owns.

The following access is standard:

- A user will always have access to the accounts where they appear in a defined relationship on the Relationships and Notes tab of the Account Information panel.
- If the user is a contact at a customer (e.g Reseller), they will have access to any account for which they are the *Reseller* and any account of which they are the *Parent*.
- A user will always have access to the incidents, problems, sales opportunities, and tasks that he is assigned.
- A participant on an incident, problem, sales opportunity, or task has the same access as the *Owner/Assignee*.
- If a user has access to an incident, problem or sales opportunity, he will have access to the associated tasks.

Elements Used to Control Object Access

Department

A user's access to specific objects can be controlled based on the access defined for the *Department* to which the user belongs.

Account Relationships

A user's access to specific accounts can also be controlled by the relationships the user has with an account.

Account Sales Status

A user's access to specific accounts can also be controlled by the account *Sales Status* through Maintain Codes. Refer to the Code Value Access topic for more information.

Product

A user's access to specific incidents can also be controlled by the *Product* through security from Product Information. Refer to the Product Value Access topic for more information.

Incident Type

A user's access to specific incidents can also be controlled by the *Incident Type* (Problem Type) through Maintain Codes. Refer to the Code Value Access topic for more information.

Object Access Security Panel

To be determined in a later release.

User Groups

A user group is primarily used to customize panels, pop-up boxes, and list boxes for a particular group of users, and to define specific access and processing options for those users. Typically, user groups are associated with certain roles or job responsibilities in the organization. There are two system defined user groups. Each company can further define the appropriate user groups for their organization. One or more users may be assigned to a specific user group.

User groups are used in the following places within the system:

- Access to specific tabs and fields through screen customization
- Access to base menu options and tool bar icons on User Group Preferences panel
- Value Security pop-up box in Maintain Codes where you can control selection of specific code values by user group
- Value Security pop-up from the Product Information where you can control selection of specific products by user group
- User Group Preferences panel where specific options are defined by user group

Adding a New User Group

The *User Group* is a code field. New values are added through the Maintain Codes/Code Types panel. Refer to the Define Field Values section of this manual for more information.

System Defined User Groups

- The 'Global' user group is considered the highest-level group. This group should have the greatest security access in comparison to other user groups that you may define. For example, when customizing screens, the 'Global' user group would see more fields than another group.
- The 'Global' user group is the default User Group. If a user is not assigned to a specific user group, it is assumed that they belong to the 'Global' user group.
- The 'WebFirst' user group is used when customizing the panels and pop-up boxes that your customers see when they are using *WebFirst*.

Assignment of a User Group

- Company Personnel panel where you can assign a user to a specific user group
- Account Information panel where you assign an account to a specific user group for access through *WebFirst*

Product Value Access

You can control which product values users can select in a product related drop down field. Since different functional areas may use different products, you may have particular values that do not apply to all users. By using the product security, you can ensure that specific values are only displayed for selection for the areas that use them.

Product access can be set by *User Class*, *User Group*, or *Department*. You can provide the following access for a specific product:

- Entry and Query access
- Only Query access
- No access

Typically you should try to use a single user category for a specific code value. If you use more than one category you must be careful not to overlap the access rights you define.

You can also control which objects users can access based on the *Product* associated with the object. For example, you may want a specific department to only be able to access incidents and problems for specific products.

Changes to the product value security are effective immediately when a new panel is opened. Active panels will not recognize the change until the panel is closed and reopened.

Refer to the Products & Equipment section of the *CustomerFirst* Reference manual or the Products section of the *SalesFirst* Reference manual for additional information.

Access

You can access the Value Security pop-up box by clicking the *Security* button on the Main tab of the Product Information panel.

Code Value Access

You can control which code values users can select in a drop down field. Since different functional groups use certain objects (incidents, problems, tasks, etc.) in different ways, you may have values in certain drop down fields that do not apply to all users. For example, the Professional Services department may be using an *Incident Type (Problem Type)* to identify an incident for a new product implementation at a customer site. The Development and QA departments will not use this value. By using the code value security, you can ensure that specific values are only displayed for selection for the department that uses them. By default, code values are available for all users.

In addition, you can control access to accounts based on specific values of the account *Sales Status*, and you can control access to incidents and problems based on specific values of the *Problem Type*.

Code value access can be set by *User Class*, *User Group*, or *Department*. You can provide the following access for a specific code value:

- Entry and Query access
- Only Query access
- No access

Typically you should try to use a single user category for a specific code value. If you use more than one category you must be careful not to overlap the access rights you define.

Code value security changes will not be effective for current users until they log out of the system and log back in.

Refer to the Define Field Values section of this manual for additional information.

Access

You can access the Value Security pop-up box by clicking the *Security* button on the Maintain Codes/Code Types panel for the highlighted *Code Value* in the list.

Reassignment Security

You can identify which users can reassign objects to specific departments defined within the system. Access can be set by *User Class*, *User Group*, or *Department*.

The reassignment security initially defaults to 'Yes'.

Access

You can access the *Reassign Security* tab of the Set-Up Defaults panel by selecting *Administration* and *Set-Up Defaults* from the menu bar.

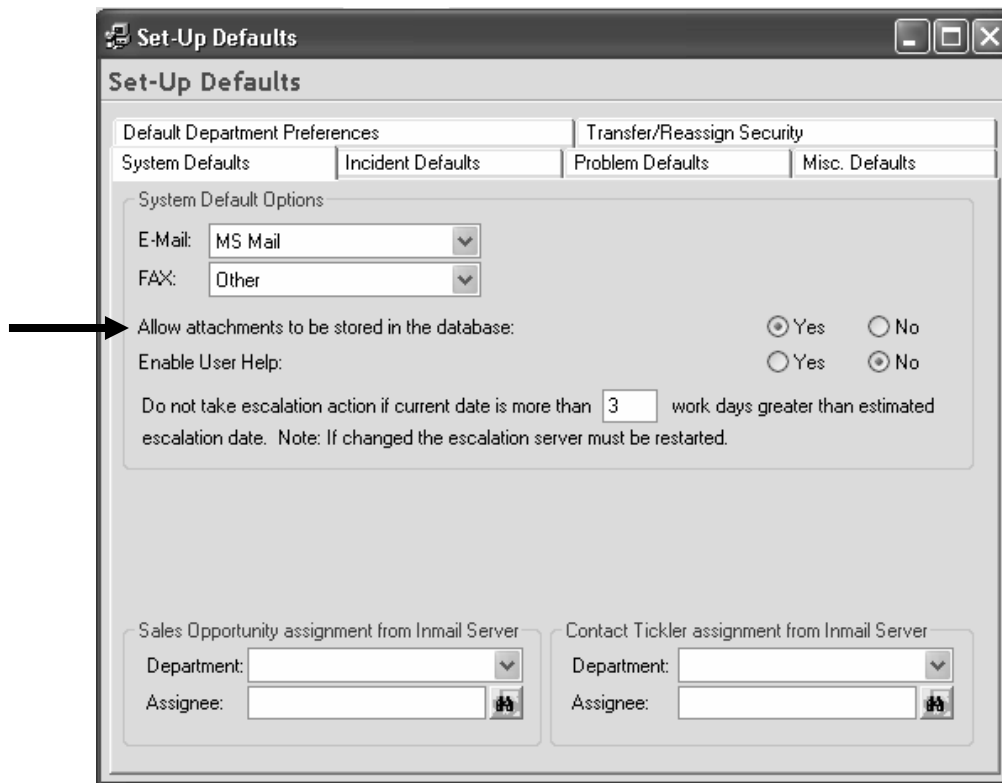
System Wide Access Related Options

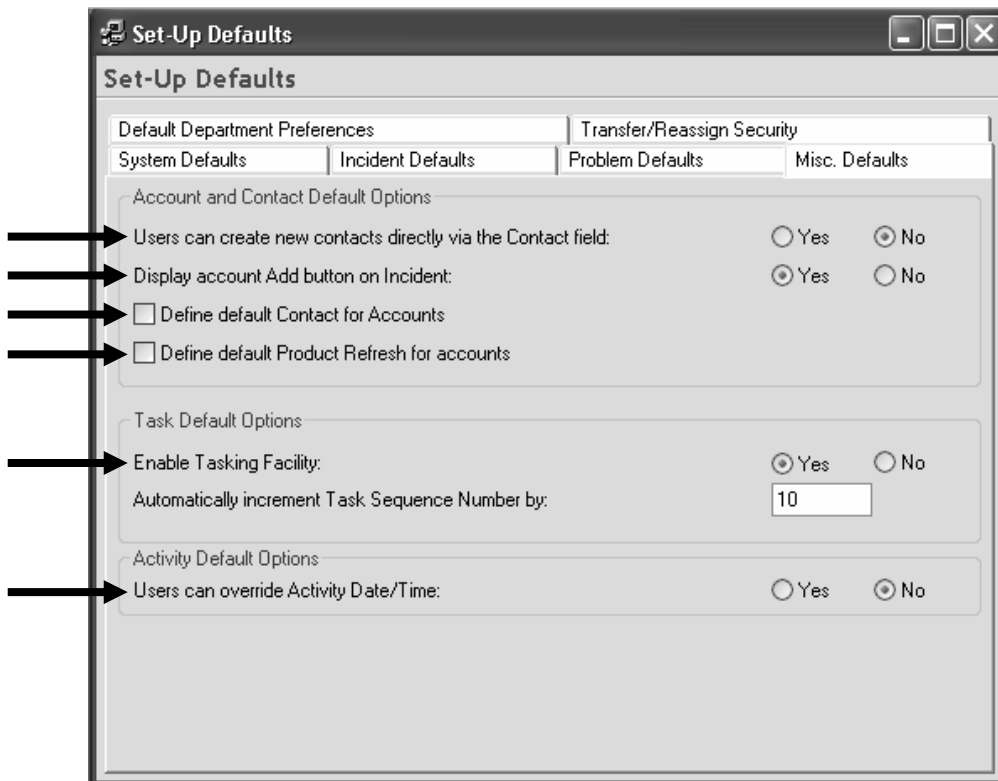
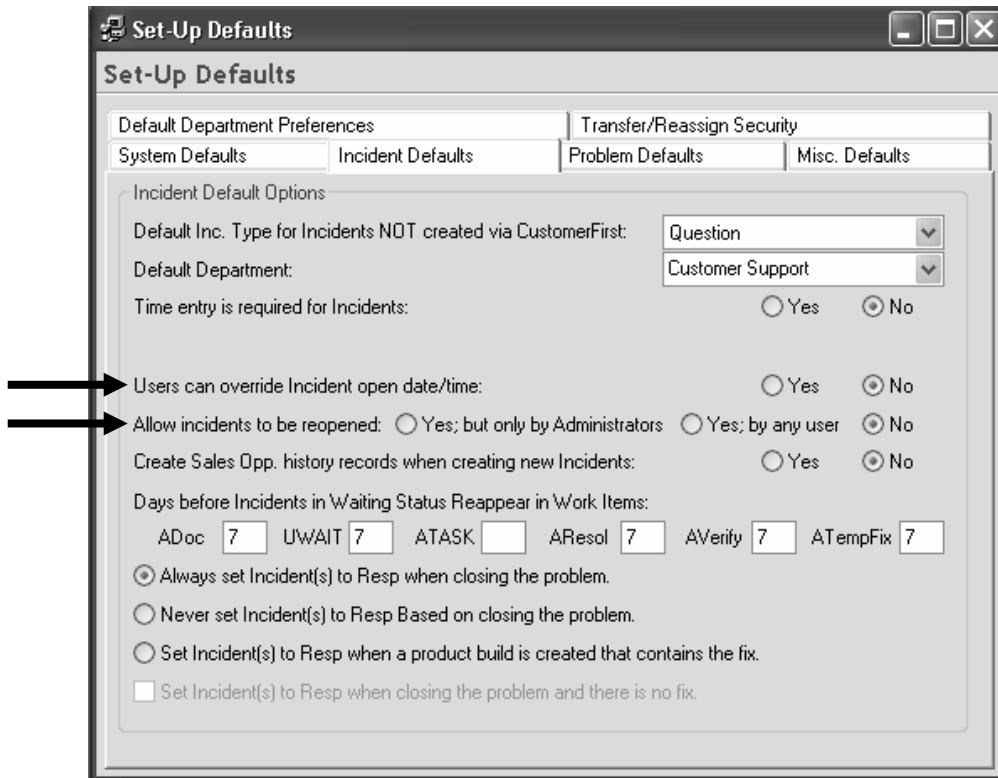
There are a number of system wide access options defined on the Set-Up Defaults panel that are not related to any specific type of user. The value selected for the option applies to all users who are performing an action associated with the option.

The access related options are identified on each tab below. Refer to the Other Setup Options section of this manual for additional information.

Access

You can access the Set-Up Defaults panel by selecting *Administration* and *Set-Up Defaults* from the menu bar.





User Group Access Related Options

There are a number of user group access related options defined on the User Group Preferences panel. The value selected for an option applies to all users in the selected user group who are performing an action associated with the option. In addition, the base menu options and tool bar icons can be hidden from this panel if appropriate.

The access related options are identified on each screen below. Refer to the Other Setup Options section of this manual for additional information.

Access

You can access the User Group Preferences panel by selecting *Administration* and *User Group Preferences* from the menu bar.

User Group Preferences: Global

General Pref. | Inc./Prob Pref. | Sales Pref. | WebFirst Pref. | Work Days | Menus/Toolbars

Default View
Default Panel at Login: Work Center
Default Navigator View: Accounts

System Options
FAX:
Limit attachment size to: KB

When Selecting Contacts

- Show contacts for others with the same parent
- Show parent and reseller contacts
- Show personnel working at Account site
- Show associated contacts

Other Selection

- Exclude prospects and prospect contacts in CustomerFirst
- Limit selection of participants to people within the current user's department.

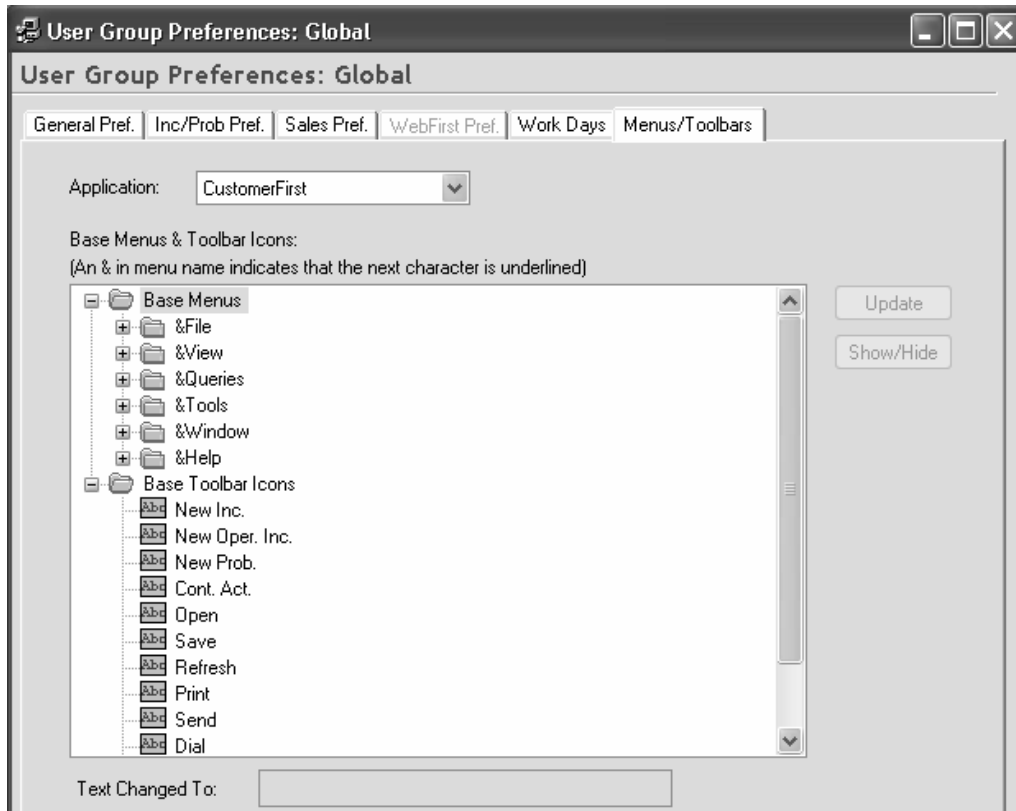
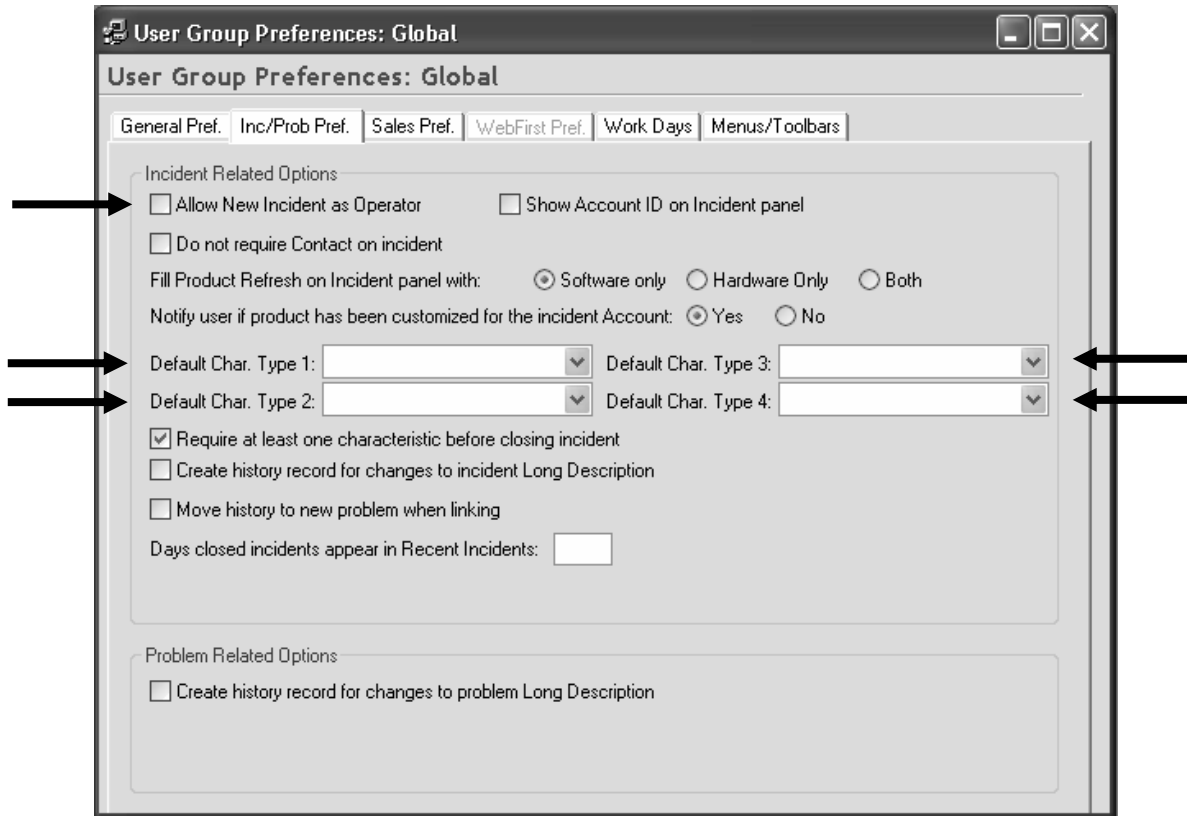
Activities

Default Tickler Date on Contact Activity? Yes No days out

Time Entry Options

- Automatically calculate Total Time
- Allow Billing Code without Other Time
- Allow Other Time without Billing Code

Default contact to recipient list: No



Individual User Access Related Options

There are several access related options that are defined at an individual user level.

- Options on the Company Personnel Panel
 - Access to *TechSearch*
 - Access to the PVCS or SourceSafe interface

Refer to the Departments & Personnel section of this manual for additional information.

- Options on the User Setup Panel
 - Access to modify the user *Password*
 - Access to the Outlook Calendar Interface
 - Access to the Alternate Customer Selection pop-up box
 - Access to the telephony interface

Refer to the General User Interface section of the *CustomerFirst* Reference manual or the *SalesFirst* Reference manual for additional information.

Account Access Through *WebFirst*

WebFirst allows your customers to dynamically access the *CustomerFirst* database over the Web using standard Web browsers. Based on the access you have provided, your customers can perform various functions related to incidents, as well as customer and contact information. There are also several queries available for a customer to view their existing incidents and to search for an answer or resolution for a particular issue.

Refer to the *WebFirst* Reference manual for additional information.

Elements to Control *WebFirst* Access

Login *Id*

The primary *Login ID* is the *Account ID*. In addition, a *User ID* can be assigned to a specific contact.

Password

A *Password* must be assigned to the account. An *Admin Password* can also be assigned to the account to allow the account to update account related information. In addition, a *Password* can be assigned to a specific contact.

Assignment of a User Class

A user class must be assigned to the account. A user class can also be assigned to a contact.

Assignment of a User Group

A user group must be assigned to the account.

Options to Control Product Value Access

Product access is defined by options on the User Group Preference panel. Access is provided based on the account's licensed products, shipped products, or all products. You can also use the Value Security pop-up box from the Product Information panel to control access to a specific product by *User Group* or *User Class*.

Options to Control Code Value Access

There is an *Exclude from WebFirst* field on the Edit Code Value pop-up box that allows you exclude a specific code value from *WebFirst*. You can also use the Value Security pop-up box from the Maintain Codes/Code Types panel to control access to a specific value by *User Group* or *User Class*.

Option to Control Characteristic Type Access

There is an *Exclude from WebFirst* field on the Characteristic Type pop-up box that allows you exclude a specific type from *WebFirst*.

Public Flags

Public flags can be used to control access to specific incidents, activities, temporary fixes, problems and problem 'Close' events.

Direct Access for Resellers or Partners

You can provide your partners and resellers direct access to *CustomerFirst* and/or *SalesFirst*. In order to provide the appropriate access, these customers and contacts will also be defined as departments and personnel within the system.

Direct access is limited to the screens, functionality, and objects that you make available. For a *Reseller* it is further limited to the data that is related to themselves and the accounts that they are a *Reseller* for.

Setup Requirements

- The reseller or partner and their relevant contacts must be defined as an account and contacts within the RTI system.
- Define one or more user classes as appropriate.
- Define the appropriate user privileges for each *User Class*.
- Define the appropriate *Object* access.
- Define one or more user groups as appropriate.
- Select *User Group* options and customize the screens as appropriate.
- Create a *Department* and related *Personnel* from the Account Information panel for the specific reseller or partner.
- Populate the appropriate fields for Department and Personnel records, such as *User Id* and *Password*.

Section 3

Departments & Personnel

Section 3

Departments & Personnel

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Overview

Department Types

The *Department Type* is used to categorize departments within the system. Typically it is used for searching and reporting purposes. However it is used for internal processing in several cases. The following predefined department types are provided with the system: 'Account', 'Client Services', 'Development', and 'Sales'. The value names can be changed.

Department types are defined in Maintain Codes/Code Types. Department types cannot be deleted but they can be inactivated. Refer to the Code Values topic of the Define Field Values section of this manual for additional information.

Departments

Departments in *CustomerFirst* or *SalesFirst* generally reflect the departments within your organization. However, departments can also be defined to create queues. For example, a department of 'Enhancements' may be defined to assign all enhancement requests to this queue until they are ready to be assigned to an actual department or individual within your organization. The following predefined departments are provided with the system: 'Customer Support', 'Development' and 'Sales'. The department names can be changed.

In addition, a department and personnel can be created for a specific account such as a reseller or partner in order to provide them with direct access to *CustomerFirst* or *SalesFirst*. Using the *Create Department/Personnel* menu option from the Account Information panel, a user can create a department and the related personnel for the account and its related contacts. A field in the department record and the personnel records identifies that it was created from an account.

Personnel

Each user of *CustomerFirst* or *SalesFirst* must be setup within a department in the database. Personnel who are not users of the system can also be defined without a *User Id* and *Password* so that they can still be selected as the contact for internal issues.

A Personnel Import is available that allows you to import the people within a department. Refer to Data Imports section of this manual for additional information.

Setup Requirements

- A *Department Type* is required to add a new department. The appropriate *Department Type* values should be defined before you add new departments. Refer to the Code Values topic of the Define Field Values section of this manual.
- If you are going to maintain address information for a department or user and you want to identify the country, values for the *Country* field must be defined. Refer to the Define Field Values section of this manual.
- A *User Group* can be defined for a department or a user. If no user group is defined, the 'Global' user group will be used. Refer to the Security section of this manual.

- A *User Class* is required to add a new user. Some system defined values are provided. The appropriate user class values should be defined before you add personnel. Refer to the Security section of this manual for additional information.
- A *User Id* and *Password* is required for a user to access the system. If possible identify how you want to define the user ids before you add personnel. Do you want to use your current network ids or some other standard identifier? The field is 20 characters.

Department List Panel

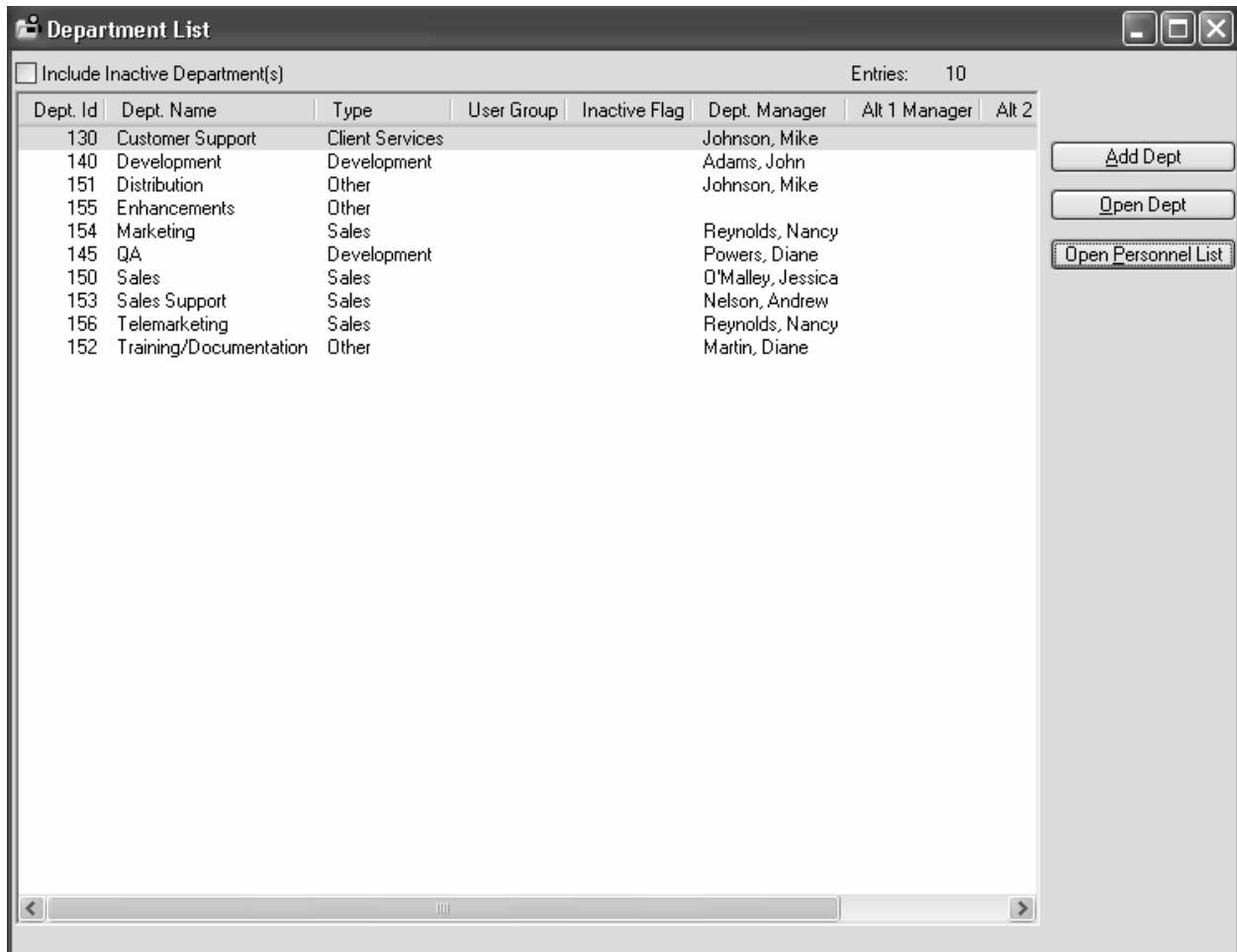
This panel displays a list of the departments that have been defined. From this panel you can access the Company Department panel to add new departments or update the existing ones.

From this panel you can also access the Department Personnel List that allows you to add a new person for a specific department or access the Company Personnel panel for an existing person.

Access

To access this panel select *Personnel* and *Department List* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays a list of the actual departments and queues defined for your organization.

Include Inactive Department(s)

If checked, the inactive departments will be displayed in the list box.

Entries

The number of line items displayed in the list box.

List Box Button Controls

Add Dept.

Displays the Company Department panel to add a new department.

Open Dept.

Displays the Company Department panel for the highlighted department. From this pop-up box the user can update information for the department.

Open Personnel List

Displays the Department Personnel List panel for the highlighted department.

Company Department Panel

This panel is used to add a new department or update an existing department.

A department can be inactivated but it cannot be deleted.

System Processing

- When a new department is added, the system will automatically create a new account record for the department. The *Account ID* will be DEPT\$\$<<Department ID>>. The *Account Type* will be 'Internal Department'. This allows an incident to be opened for a department. The department name can be selected in the *Account* field. A field in the account record identifies that it was created when adding a department.
- When a department is inactivated, the personnel in the department are also inactivated.
- When a department is inactivated, the associated account and contacts are also inactivated.

Main Tab

This tab contains the primary information about a department.

Panel Layout

The screenshot shows a software window titled "Company Department: Customer Support". At the top, there are three tabs: "Main", "Statistics", and "Misc.". The "Main" tab is selected. The form contains the following fields and controls:

- Department Name: Text input field containing "Customer Support".
- Department Type: Dropdown menu showing "Client Services".
- User Group: Dropdown menu.
- Industry: Dropdown menu.
- Manager: Text input field containing "Johnson, Mike" with a user selection icon.
- Alt 1 Manager: Text input field with a user selection icon.
- Alt 2 Manager: Text input field with a user selection icon.
- Alt 3 Manager: Text input field with a user selection icon.
- Inactive
- Added Via Account
- Address** section:
 - Address 1: Text input field
 - Address 2: Text input field
 - Address 3: Text input field
 - Address 4: Text input field
 - Address 5: Text input field
 - City: Text input field
 - State/Province: Text input field
 - Postal Code: Text input field
 - Country: Dropdown menu
 - Phone: Text input field
 - FAX: Text input field
- Comments: Text area with a "Comments" label and a small icon.

Panel Elements

Department Name

(Department.Department_Name)

The name of a department. This must be a unique name. If a department name is changed, it will be changed for all historical records that reference the department. This field is required. This can also be updated from the Account Information panel for the associated account.

Department Type

(Department.Department_Type_Id)

The type of department. It is typically used to categorize departments within the system for searching and reporting purposes. Valid values are defined through Maintain Codes/Code Types for Department_Type_Id. This field is required. The following department types are used by the system for specific processing.

CS	All departments that have a Department Type with this Internal Value are included in the Support Center drop down field on the Account Information panel.
SALES	All departments that have a Department Type with this Internal Value are displayed in the Sales Region and Support Center drop down field on Account Information panel.
ACCT	All departments that have a Department Type with this Internal Value are Departments that were created from the Account Information panel. This type cannot be modified.

User Group (Department.Group_Pref_Id)
Identifies the User Group for the department. If this is left blank, the 'Global' user group is used. The user group for each person in the department will default to the value in this field. Valid values are defined through Maintain Codes/Code Types for User_Group_Id.

Industry (Department.Sic_Code_Id)
This is used in conjunction with the Industry on the Account Information panel when creating Report 28: Organizational Summary Report. Valid values are defined through Maintain Codes/Code Types under the Industry_Code_Id.

Manager (Department.Manager_Id)
The name of the supervisor of the department. The name must be a valid name in the database. When a department is initially set up, this field is left blank until users are setup within the department.

The Manager of a department has additional access to sales projections, the Sales Forecast query, and the Individual and Department Time Summaries. In addition, the Manager of a department will receive e-mail messages when an item is assigned to the department rather than an individual within the department.

Alt 1-3 Manager (Department.Alt1-3_Manger_Id)
Identifies the alternate department managers for the department. These fields are used to provide additional manager level access to the following:

- Department Time Summary & Individual Time Summary panels
- Sales Forecast panel

Inactive (Department.Active_Flag)
Indicates that the department is no longer active. If a department is marked as inactive, the department will not appear for selection in drop down lists. When a department is inactivated, all personnel in the department are also inactivated, as well as the associated account and contacts. This can also be updated from the Account Information panel for the associated account.

Added Via Account (Department.Added_Via_Acct)
If checked, indicates that the department was created from the Account Information panel.

Address 1-5 (Address.Line1-5)
The address for the department. This can also be updated from the Account Information panel for the associated account.

City (Address.City)

The city where the department is located. This can also be updated from the Account Information panel for the associated account.

State/Province (Address.State)

The state or province where the department is located. This can also be updated from the Account Information panel for the associated account.

Postal Code (Address.Zip)

The postal code or zip code where the department is located. This can also be updated from the Account Information panel for the associated account.

Country (Address.Country_Id)

Name of the country where the department is located. Valid values are defined through the Country List. This can also be updated from the Account Information panel for the associated account.

Phone (Address.Company_Phone)

The phone number for the department. This can also be updated from the Account Information panel for the associated account.

FAX (Address.Company_Fax.Phone)

The fax number for the department. This can also be updated from the Account Information panel for the associated account.

Comments (Department.Comments)

User defined comments to provide additional information about the department. This can also be updated from the Account Information panel for the associated account.

Statistics Tab

This tab identifies the specific statistics that will be displayed in the Current Statistics in the Navigator for users in the department. When the user double clicks on a Current Statistic a list of the specific objects that make up the value are displayed. A statistic can be displayed for all users in the department or only the managers of the department. You can also require that a statistic be displayed.

RTI has provided a number of predefined statistics that can be used. Additional statistics can be created using the RTI SQL Search. When a query is saved from the RTI SQL Search panel you can indicate if it is to be used as a statistic. It will then be available for selection from this tab.

Panel Layout

Company Department: Customer Support

Main Statistics Misc.

Statistics for this Department Entries: 1

Name	Min. Interval	For User	For Manager	Required	Owner	Description
Open Unowned Incidents for Dept	5	Y	Y			Count of open incidents

Remove Statistic

Properties

Available Statistics Entries: 55

Name	Interval	Threshold	Owner
Open Unowned Tasks for Dept	15		
Open Incidents with Priority of 'Hot' for Dept	5		
Open Unowned Problems for Dept	5		
Open Unowned Sales Opportunities for Dept	5		
Open Incidents with Severity of 'Critical Impact' for Dept	5		
Open Sales Opps with Projections with Missed Close Date for Dept	600		
Incidents Closed Today for Dept	5		
Incidents Opened Today for Dept	5		
Open Incidents with SLA Time Less than 1 Hour for Dept	10		
Open Incidents with Severity of 'Critical Impact' for Dept Type	5		
Open Problems with Severity of 'Critical Impact' for Dept	5		
Open Problems with Severity of 'Critical Impact' for Dept Type	5		
Open Tasks with Severity of 'Critical Impact' for Dept	15		
Open Tasks with Severity of 'Critical Impact' for Dept Type	15		
Open Unowned Sales Opportunities for Dept Type	5		

Add for Dept.

Panel Elements

Statistics for this Department

Displays a list of the statistics that will be displayed in the Current Statistics in the Navigator for users in this department. The statistics will be displayed in the Current Statistics in the order that they are displayed in this list box.

Entries

The number of items displayed in the list box.

List Box Button Controls

Arrow Keys

Moves the highlighted statistic up or down in the list box.

Remove Statistic

Removes the highlighted statistic in the list box.

Properties

Displays the Statistic Properties pop-up box where specific options can be defined for the statistic.

Available Statistics

Displays a list of the statistics that can be displayed in the Current Statistics in the Navigator for users in this department.

Entries

The number of items displayed in the list box.

List Box Button Controls

Add for Dept.

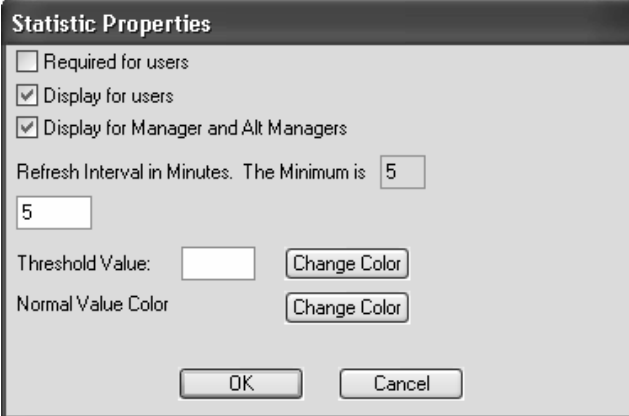
Adds the highlighted statistic in this list box to the Statistics for this Department list box.

Statistic Properties Pop-up Box

This pop-up box allows specific options to be defined for the statistic selected in the Statistics for this Department list box.

An individual user can update the *Refresh Interval*, *Threshold Value* and colors for an available statistic from the User Setup panel.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Statistic Properties". It contains the following elements:

- Three checkboxes: "Required for users" (unchecked), "Display for users" (checked), and "Display for Manager and Alt Managers" (checked).
- A text label "Refresh Interval in Minutes. The Minimum is" followed by a small input field containing "5".
- A larger input field containing "5".
- A text label "Threshold Value:" followed by an empty input field and a "Change Color" button.
- A text label "Normal Value Color" followed by an empty input field and a "Change Color" button.
- At the bottom, there are "OK" and "Cancel" buttons.

Pop-Up Box Elements

Required for users

If checked, this statistic will always be displayed for the users in this department. A user cannot remove the statistic from the User Setup panel.

Display for users

If checked, this statistic will be displayed for the users in this department that are not defined as the *Manager* or an *Alt Manager*. This field is checked by default.

Display for users

If checked, this statistic will be displayed for the users in this department that are defined as the *Manager* or an *Alt Manager*. This field is checked by default.

Refresh Interval in Minutes

Identifies how often the query should be run to refresh the statistic value. This interval must be 5 minutes or greater.

Threshold Value

Allows the user to identify a specific value for the statistic at which time the color will be changed in the Navigator to the color selected. The color of the value in this field identifies the color that will be used in the Current Statistics in the Navigator.

Change Color button

Displays the Color pop-up box that allows a color to be selected for the statistic when the *Threshold Value* is met.

Normal Value Color

The color of this label identifies the color that will be used in the Current Statistics in the Navigator for a normal value for the statistic.

Change Color button

Displays the Color pop-up box that allows a color to be selected for a normal value for the statistic.

Pop-up Button Controls**OK**

Closes the pop-up box and saves any changes.

Cancel

Closes the pop-up box without saving any changes.

Misc. Tab

This tab contains user defined miscellaneous fields that allow you to define information that is required by your organization. Through screen customization these field labels can be changed to indicate the purpose of the field. Refer to the Screen & List Box Customization section of this manual for additional information.

Panel Layout

Company Department: Customer Support

Main Statistics Misc.

Misc.

Misc. Edit 1:	<input type="text"/>	Misc. Drop. 1:	<input type="text"/>
Misc. Edit 2:	<input type="text"/>	Misc. Drop. 2:	<input type="text"/>
Misc. Edit 3:	<input type="text"/>	Misc. Drop. 3:	<input type="text"/>
Misc. Edit 4:	<input type="text"/>	Misc. Drop. 4:	<input type="text"/>

Panel Elements

Misc. Edit 1-4

(Department.Misc1-4)

User defined miscellaneous text fields to provide additional information about the department.

Misc. Drop 1-4

(Department.Misc_Dropdown1-4)

User defined miscellaneous drop down fields to provide additional information about the department. Valid values are defined in Maintain Codes/Code types for Dept_Misc1-4_Id.

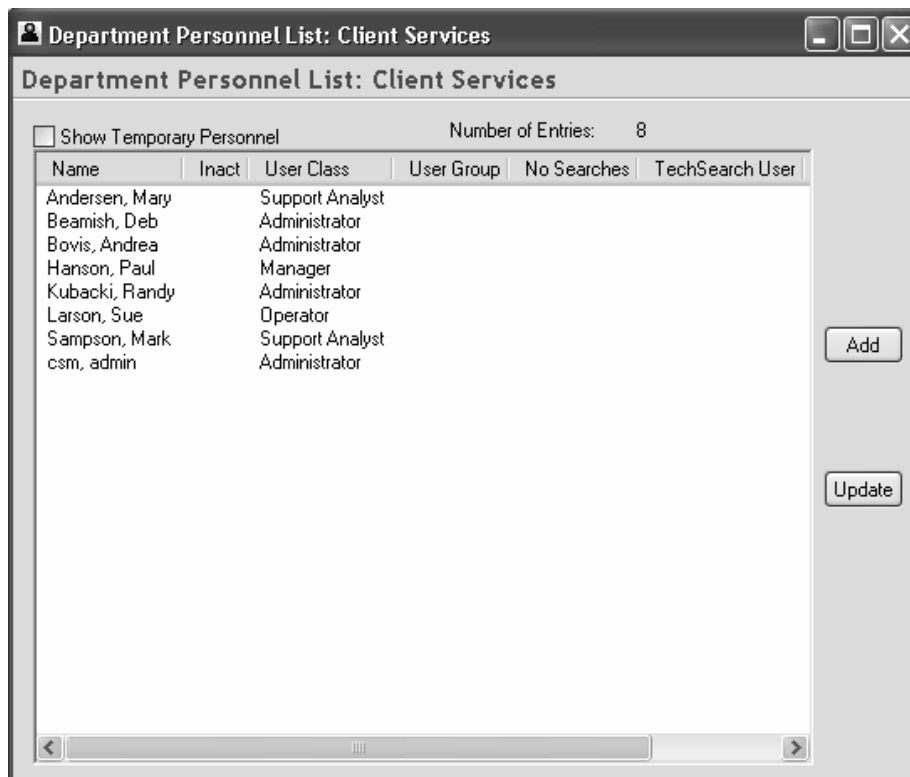
Department Personnel List Panel

This panel displays the personnel in a specific department. From this panel you can access the Company Personnel pop-up box to add a new person or update an existing one.

Access

This panel is accessed from the Department List panel. Select *Department List* and *Department Personnel List* from the menu bar, or double click on the specific department in the list box.

Panel Layout



Panel Elements

List Box

Displays a list of the personnel defined for the selected Department.

Show Temporary Personnel

If checked, all personnel within the department are displayed in the list box. If the checkbox is not checked, then people that have the *Temporary Personnel* field checked on their personnel record will not displayed.

Number of Entries

The number of users displayed in the list box.

List Box Button Controls**Add**

Displays the Company Personnel pop-up box for the user to add a new person in the selected Department.

Update

Displays the Company Personnel pop-up box for the selected person so that the information can be updated. This button is disabled if there are no users defined for the selected Department.

Company Personnel Panel

The Company Personnel panel is used to track information about the personnel within your organization.

A person can be added to only one department. However, a person can be moved from one department to another.

A person can be inactivated but cannot be deleted.

System Processing

- When a new person is added to a Department, the system will automatically create a new contact record. The *Contact* will be associated with the Account record for the person's Department. This allows an incident to be opened for a specific user. The user name can be selected in the *Contact* field. A field in the contact record identifies that it was created when adding personnel.
- When a person is inactivated, the associated contact is also inactivated.

Common Panel Elements

Panel Button Controls

OK

Saves the current changes and closes the panel.

Add

Saves the information on the panel and clears the panel to allow entry of a new person.

Cancel

Closes the panel without saving any changes.

Main Tab

This tab contains the primary information for a person.

Panel Layout

Panel Elements

First Name

(Personnel.First_Name)

The person's first name. This field is required. This can also be updated from the Account Contact panel for the associated contact.

Last Name

(Personnel.Last_Name)

The person's last name. This field is required. This can also be updated from the Account Contact panel for the associated contact.

Title

(Personnel.Title)

The person's job title.

- Person Role** (Personnel.Personnel_Role_Id)
The person's role within the organization. Valid values are defined through Maintain Codes/Code Types in Personnel_Role_id.
- Person ID** (Personnel.Person_Id)
The unique id for this person. The system automatically assigns this number but it can be overridden if you wish to assign your own identification. This field is disabled if you are updating an existing person. This field is required.
- Department** (Personnel.Department_Id)
The department to which this person belongs. This field is required.
- User Class** (User_Profile.User_Class_Id)
Panel security access for the person. A person's user class defines what panels, tabs, and pop-up boxes can be accessed. The user class could also be used to control access to code values and product values. Valid values are defined through Maintain Codes/Code Types in User_Cls_Name_Id. This field is required.
- User Group** (Personnel.Group_Pref_Id)
The user group to which this person belongs. If this field is left blank, the user group defined for the Department will be used. If that field is also blank, the 'Global' user group will be used. Valid values are defined in Maintain Codes/Code Types in User_Group_Id.
- Date Created** (Personnel.Date_Created)
The date this record was added to the database. This is a read-only field.
- Add Via Contact** (Personnel.Added_Via_Cont)
If checked, indicates that the personnel record was created from the associated contact record. This is a read-only field.
- Contact ID** (Personnel.Cust_Person_Id)
This is the ID for the associated contact record. This is a read-only field.
- Termination Date** (Personnel.Termination_Date)
The effective date of termination.
- This employee is inactive** (Personnel.Employee_Status)
Indicates that the person is no longer an active user in the database. If a person is marked as inactive, the person will not appear for selection in drop down lists except for ad-hoc searches. The person will not be able to log into the system. When an employee is inactivated the associated contact is also inactivated.
- TechSearch User** (User_Profile.TechSearch_User)
If checked, indicates that the user will have access to an available *TechSearch* license when he logs into *CustomerFirst* or *SalesFirst*.
- Temporary Personnel** (Personnel.Temporary_Person)
If checked, indicates that the user is a temporary user of the system.
- Do not show for searches** (Personnel.Std_Selection)
If checked, this person will not be displayed in any of the drop down lists for the personnel related fields in ad-hoc searches or queries.

- Phone Number** (Personnel.Phone_Number)
The individual's phone number. This can also be updated from the Account Contact panel for the associated contact.
- Mobile Phone** (Personnel.Mobile_Phone)
The person's mobile telephone number. This can also be updated from the Account Contact panel for the associated contact.
- Beeper Number** (Personnel.Beeper_Number)
The individual's beeper or pager number.
- FAX Number** (Personnel.Fax_Phone)
The individual's fax number. This can also be updated from the Account Contact panel for the associated contact.
- E-Mail Address** (Personnel.E-Mail_Address)
The individual's primary e-mail address. This can also be updated from the Account Contact panel for the associated contact.
- Alt 1-2 E-Mail Addr** (Personnel.Alt1-2_E-Mail_Addr)
Alternate e-mail addresses for the person. Escalation rules can be created that send messages to the alternate e-mail addresses.
- Location** (Personnel.Location)
The location of this person. This can also be updated from the Account Contact panel for the associated contact.
- User ID** (User_Profile.User_Id)
The ID that the individual will use in conjunction with the *Password* to log into the system. This ID must be unique. Typically the person's network ID is used.
- Password** (User_Profile.Password)
The password that the individual will use in conjunction with the *User ID* to log into the system.
- Comments** (Personnel.Comments)
Can be used to enter additional information about the person. This can also be updated from the Account Contact panel for the associated contact.
- SCI Options**
The Source Control Interface options.

Address Tab

This tab contains the address information for a person.

When a new person is added, all fields on this tab default to the corresponding information from the department to which the person belongs. The *Sync with Department* checkbox will be checked. If the *Sync with Department* checkbox is unchecked, the address information can be modified.

If the person's address is the same as the department's address (the addresses are synchronized), then the mailing (Address_Id), billing (Bill_Address_Id), and shipping (Ship_Address_Id) for the person are the same as the department's. The mailing (Address_Id), billing (Bill_Address_Id), and shipping (Ship_Address_Id) are always the same for the person and the associated contact record.

Panel Layout

The screenshot shows a dialog box titled "Company Personnel" with three tabs: "Main", "Address", and "Misc". The "Address" tab is selected. In the top right corner of the tab area, there is a checked checkbox labeled "Sync with Department". Below this, there are five text input fields labeled "Address 1:", "Address 2:", "Address 3:", "Address 4:", and "Address 5:". Underneath these are four more input fields: "City:", "State/Prov.:", "Postal Code:", and "Country:". The "Country:" field is a dropdown menu. At the bottom of the dialog box, there are three buttons: "OK", "Add", and "Cancel".

Panel Elements

Sync with Department (checkbox)

If this check box is checked, the person's address is synchronized with the address of the department to which the person belongs. When this checkbox is checked, all fields on this tab are disabled. This can also be updated from the Account Contact panel for the associated contact.

Address 1-5 (Address.Line1-5)

The address for the person. This can also be updated from the Account Contact panel for the associated contact.

City (Address.City)

The city where the person is located. This can also be updated from the Account Contact panel for the associated contact.

State/Prov. (Address.State)

The state or province where the person is located. This can also be updated from the Account Contact panel for the associated contact.

Postal Code (Address.Zip)

The postal code or zip code where the person is located. This can also be updated from the Account Contact panel for the associated contact.

Country (Address.Country_Id)

Name of the country where the person is located. This can also be updated from the Account Contact panel for the associated contact.

Misc. Tab

This tab allows you to define specific information that is required by your organization. Through screen customization these field labels can be changed to indicate the purpose of the field. Refer to the Screen & List Box Customization section of this manual for additional information.

Panel Layout

Panel Elements

Misc. 1-4

(Personnel.Misc1-4)

User defined miscellaneous text fields to provide additional information about this person.

Misc. Dropdown1-4

(Personnel.Misc_Dropdown1-4_Id)

User defined miscellaneous drop down fields to provide additional information about the person. Valid values are defined on the Maintain Codes/Code Types panel for Pers_Misc_Dropdown1-4_Id.

Misc. Date 1-2

(Personnel.Misc_Date1-2)

User defined miscellaneous date fields to provide additional information about the account. If entered, a date must be entered in a valid format.

Personnel List Panel

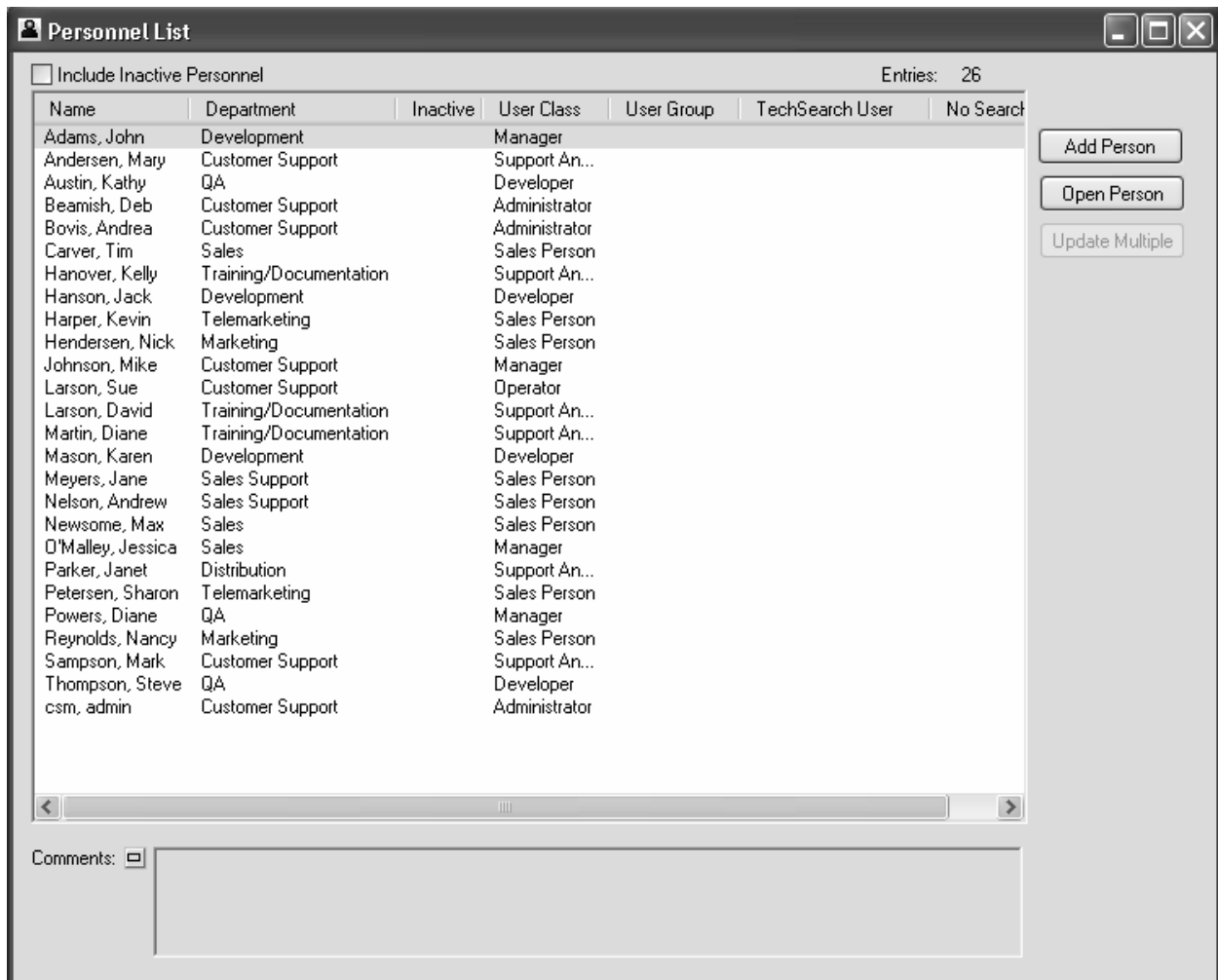
The Personnel List panel displays a complete list of all users in the system.

From the list you can select multiple people at one time and change their *Department*, *User Group*, *User Class*, and the *Inactive* flag using the *Update Multiple* button.

Access

To access this panel select *Personnel* and *Personnel List* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays a list of personnel defined within the system.

Include Inactive Personnel

If this field is checked, the inactive personnel will be displayed in the list box.

Entries

The number of users displayed in the list box.

Related Information**Comments**

The comments associated with the person selected in the list box.

List Box Button Controls**Add**

Displays the Company Personnel panel to allow entry of a new user.

Update Multiple

Allows the user to update specific information for multiple people at one time. If only one user is selected in the list box then this button is disabled. If more than one user is selected when this button is clicked, the Update Selected Personnel pop-up box is displayed.

Update Selected Personnel Pop-Up Box

This pop-up box allows the user to update the *Department*, *User Class*, *User Group*, and the *Inactive* flag for multiple people at one time.

Pop-Up Box Layout

Pop-Up Box Elements

Department (Personnel.Department_Id)
Displays a list of all active departments in the system.

User Class (User_Profile.User_Class_Id)
Displays a list of all active User Classes in the system.

User Group (Personnel.Group_Pref_Id)
Displays a list of all active User Groups.

Active (Checkbox) (Personnel.Employee_Status)
If checked, the *This employee is inactive* checkbox on the Company Personnel pop-up will be unchecked.

Inactive (Checkbox) (Personnel.Employee_Status)
If checked, the *This employee is inactive* checkbox on the Company Personnel pop-up will be checked.

TechSearch User (Checkbox) (User_Profile.TechSearch_User)
If checked, the *TechSearch User* checkbox on the Company Personnel pop-up will be checked.

Non-TechSearch User (Checkbox) (User_Profile.TechSearch_User)
If checked, the *TechSearch User* checkbox on the Company Personnel pop-up will be unchecked.

Pop-up Button Controls

OK
Closes the pop-up box and saves any changes.

Cancel

Closes the pop-up box without saving any changes.

Find Personnel Pop-Up Box

This pop-up box allows the user to select a person based upon specific criteria. This can be accessed from any person field, such as *Owner*, *Assignee*, *Salesperson*, *Participant*, etc.

Pop-Up Box Layout

Department	Last Name	First Name	Address 1	Address 2	City	State/Prov.	Country
Client Services	Andersen	Mary					
Client Services	Beamish	Deb					
Client Services	Bovis	Andrea					
Client Services	csm	admin					
Client Services	Hanson	Paul					
Client Services	Kubacki	Randy					

Pop-Up Box Elements

Full Name (Last, First)

This field allows the user to search on both the first and last name of a person at the same time. This field is in the format LastName, FirstName.

Last Name

(Personnel.Last_Name)

The last name of the contact that you want to open. If you enter any characters in the *Name* field before a comma (,) on the panel that you accessed the Find Personnel pop-up box from, those characters will default into this field.

First Name

(Personnel.First_Name)

The first name of the contact that you want to open. If you enter any characters in the *Name* field after a comma (,) on the panel that you accessed the Find Personnel pop-up box from, those characters will default into this field.

Phone

(Personnel.Phone_Number)

The person's phone number.

Mobile

(Personnel.Mobile_Phone)

The person's mobile telephone number.

E-Mail

(Personnel.E_Mail_Address)

The person's phone number.

City (Address.City)
The name of the city in which the person's mailing address is located.

State/Prov. (Address.State)
The name of the state in which the person's mailing address is located.

Country (Address.Country_Id)
The country in which the person's mailing address is located.

Postal Code (Address.Zip)
The postal or zip code in which the person's mailing address is located.

Show Temporary Personnel (checkbox)

If checked, all active personnel that meet the other criteria on the pop-up box are displayed when the *Find* button is clicked. If the checkbox is not checked, then people that have the *Temporary Personnel* field checked on their personnel record are not included.

Active Only (checkbox)

If checked, only active personnel that meet the other selection criteria are displayed. This field is currently always checked.

List Box

This list box displays a list of the personnel that match the criteria entered.

Pop-up Button Controls

Find

Performs a search of all personnel that meet the selected criteria on the Find Personnel pop-up box.

OK

Passes the selected person to the *Name* field on the invoking panel in the format Last Name, First Name.

Cancel

Closes the Find Personnel pop-up box.

Section 4

Screen & List Box Customization

Section 4

Screen & List Box Customization

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Screen Customization

The panels and pop-up boxes used within the system can be customized to satisfy specific requirements for your organization.

With the exception of field label changes which can be done at a system level, all screen customizations are defined by *User Group*. The 'Global' user group should have the greatest access and include the company wide changes. Other user groups can be defined to provide more limited access. When a change is made for the 'Global' user group, the change will be made for all other user groups unless the specific item has already been customized for the user group.

Screen customizations can be copied from one user group to another user group. This includes all screen customizations made through the Customizing Panel Template panel.

Types of Screen Customization

- Change the name of base menu options or tool bar icons
- Hide base menu options or tool bar icons
- Change the title of a panel or pop-up box
- Change the screen size
- Change a tab name
- Change the order of the tabs
- Hide a tab
- Change a field label
- Change the color of a label
- Add a user defined label
- Hide or disable a field
- Add a default value for a field
- Make a field required
- Move, size and align fields

Hidden Elements by Default

- On many of the panels with tabs one or more blank tabs are provided for the panel. The tabs are hidden by default. The tabs were provided to make it easier to move items off of other tabs, or to move fields to the tab for a specific purpose.
- There are miscellaneous fields hidden by default on the Close Incident pop-up and the Close Problem pop-up.

New Product Releases

Screen customizations are stored in the RTI Customizations table in the database. Typically when you upgrade to a new release your screen customizations are not affected. However, if a panel is actually modified as a part of the new release then the location of fields could be impacted.

Setup Requirements

- The user who is going to complete the screen customization must have ADMIN or UPDATE access to the following panels.
 - Maintain Table and Column Information panel to modify a field label at the system level
 - User Group Preferences panel to modify base menu options and tool bar icons
 - Layout Changes panel, Layout Mode panel, and the panel being customized to make changes to a specific panel or pop-up box

Refer to the Security section of this manual for additional information.

- In order to complete screen customization for a new user group, the user group must be defined first. Refer to the Security section of this manual for additional information.

Change Field Label at System Level

The name of a field can be changed in the user interface. For example, if your organization is using specific miscellaneous fields on the Misc. 1 tab of the Account Information panel, you can rename the fields to provide meaningful labels.

You can identify a single label for a field to be used on panels and list boxes, or you can define one label to be used on the panels and pop-ups, and a separate label to be used in the list boxes. Separate labels can be beneficial if you want to shorten the label in the list boxes for viewing purposes. The label changes at the system level are specific to the table for which they were made.

Not all labels can be changed or should be changed at the system level.

- On the Maintain Table and Column Information panel, if a field appears in the *Columns* list only as an ID field, the related field cannot currently be changed at the system level.
- Changes made at the system level to the history related columns will be reflected on the related panels and/or pop-up boxes such as an activity, but will not be shown on the History tabs of the Incident, Problem, and Task panels. A number of the columns are shared by the objects on the History tab and as a result cannot be defined at the system level. A column can be modified for a History tab through screen customization but the change will be shown on all three of the history tabs.
- Labels for columns in the License_Item table should not be changed at the system level. The columns in this table are used for both licenses and maintenance contracts. A label change would typically not apply to both.
- Many of the labels for columns in the Work_Items table should not be changed to be related to a specific object. Columns in this table are used for multiple objects. A label change may not apply to all objects.

If appropriate, a field label can also be modified for a specific panel, pop-up box, or list box through customization for the specific screen.

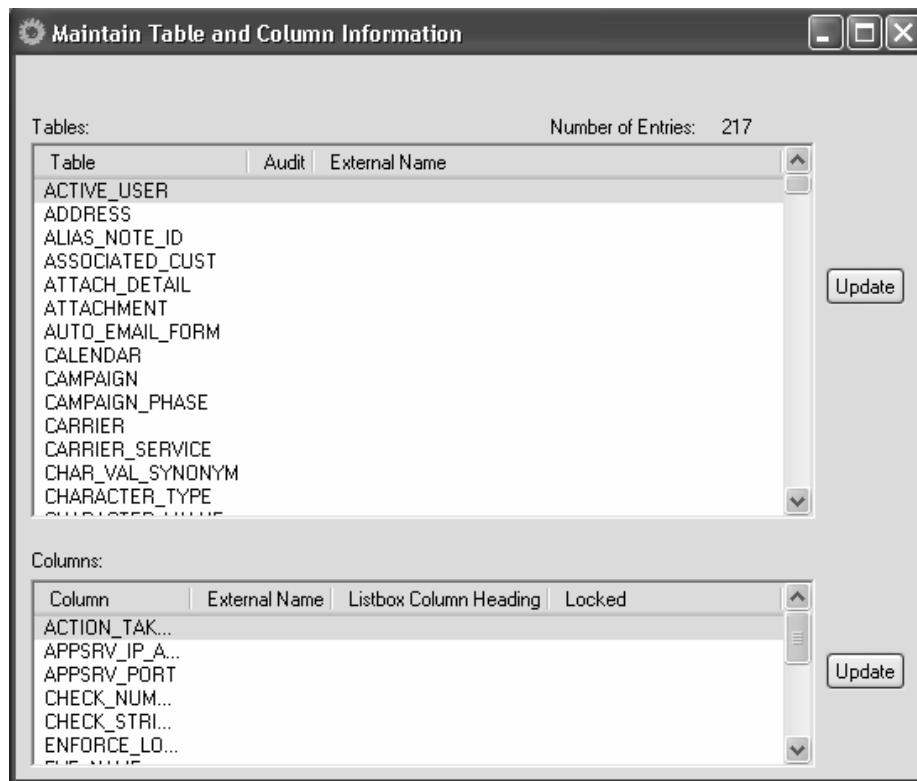
Maintain Table and Column Information Panel

From this panel you can select the specific field for which you want to change the label. The columns (fields) for the selected table are displayed.

Access

To access this panel, from System Administration select *Administration* and *Database Related* and *Maintain Table/Column Info* from the menu bar.

Panel Layout



Panel Elements

Tables List Box

Displays a list of the tables within the database.

Number of Entries

The number of tables displayed in the Tables list box.

List Box Button Controls

Update

Displays the Update Table Information pop-up box to allow the user to set the audit flag on. This is not related to screen customization.

Columns List Box

Displays a list of the columns in the table selected in the Tables list box.

List Box Button Controls**Update**

Displays the Update Column Information pop-up box to allow the user to modify the field label.

Update Column Information Pop-Up Box

From this pop-up you can identify a single label for a field to be used on panels and list boxes, or you can define one label to be used on the panels and pop-ups, and a separate label to be used in the list boxes.

Pop-Up Box Layout

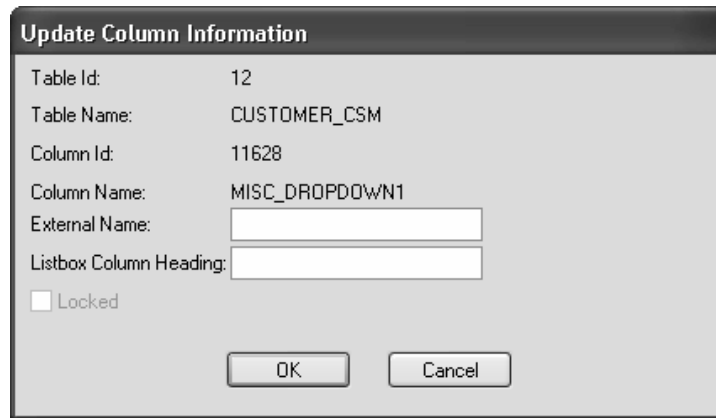


Table Id:	12
Table Name:	CUSTOMER_CSM
Column Id:	11628
Column Name:	MISC_DROPDOWN1
External Name:	<input type="text"/>
Listbox Column Heading:	<input type="text"/>
<input type="checkbox"/> Locked	

OK Cancel

Table Id

The unique identifier of the table to which the column belongs.

Table Name

The name of the table to which the column belongs.

Column Id

The unique identifier of the column.

Column Name

The name of the column as it appears in the database.

External Name

The alternate name for the column used on panels, pop-up boxes and Pivot Tables. It is also used in list boxes if the *Listbox Column Heading* field is blank.

Listbox Column Heading

The alternate name for the column used in list boxes.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Modify Base Menu Options and Tool Bar Icons

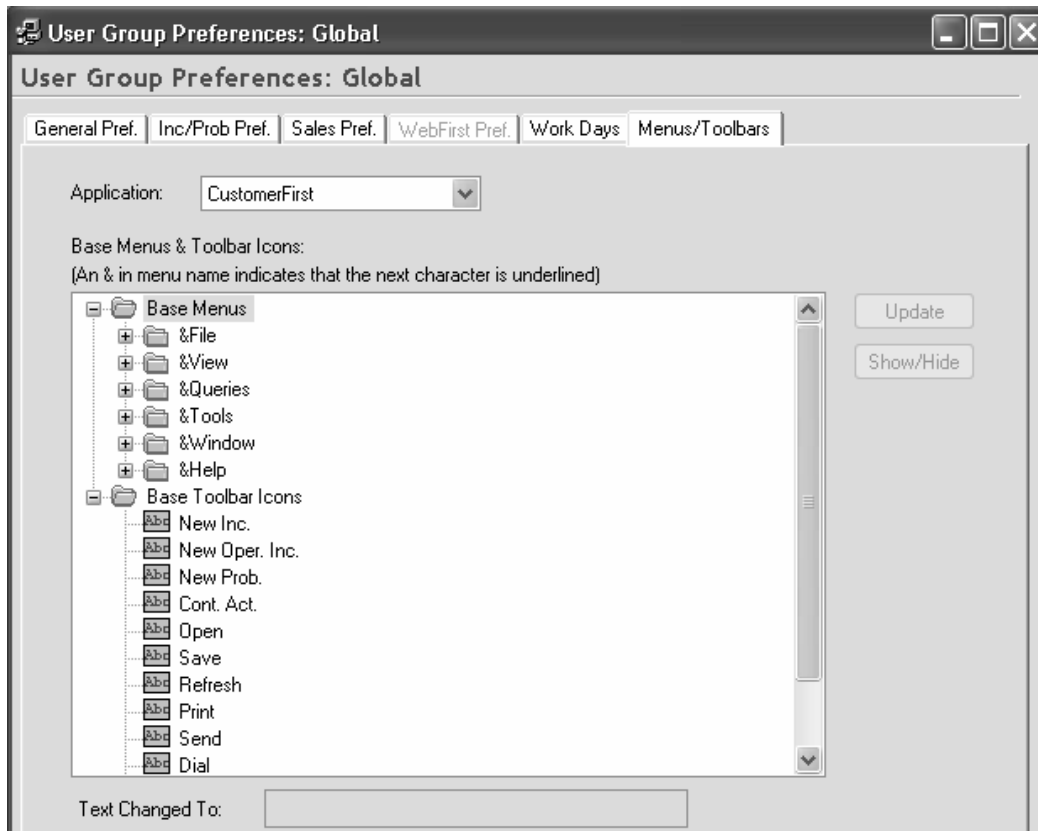
The base menu options and tool bar icons on the left side of a panel are standard items that are typically always displayed regardless of what specific panel is active. If appropriate, these items can be renamed or hidden by user group on the Menus/Toolbars tab of the User Group Preference panel.

Refer to the Other Setup Options section of this manual for additional information.

Access

To access this panel, from System Administration select *Administration* and *User Group Preferences* from the menu bar.

Panel Layout



Customize Specific Panel or Pop-Up Box

With the exception of field label changes which can be done at a system level, all screen customizations are defined by *User Group*. The 'Global' user group should have the greatest access and include the company wide changes. Other user groups can be defined to provide more limited access. When a change is made for the 'Global' user group, the change will be made for all other user groups unless the specific item has already been customized for the user group.

You must access the screen customization feature from the panel or pop-up box that you want to customize. You must also select which *User Group* the customization applies to on the Choose Customization Level Pop-Up Box.

The Customizing Panel Template panel is used for most of the actual screen customization. It appears differently depending on which customization menu option is selected.

Access

From the specific panel or pop-up box that you want to customize, right click within the entry area of the screen and select the appropriate menu option.

Choose Customization Level Pop-Up Box

This pop-up is displayed when a user selects a screen customization related menu option from a specific panel or pop-up box.

Pop-Up Box Layout



Pop-Up Box Elements

User Group

The name of the user group for which the screen customization changes will apply. The user's current *User Group* is the default value.

Pop-up Button Controls

OK

Displays the Customizing Panel Template panel for the specific screen and the selected *User Group*.

Cancel

Closes the pop-up box and displays the original panel or pop-up box.

Customizing Panel Template Panel

The Customizing Panel Template panel is used for most of the actual screen customization. It appears differently depending on which customization menu option is selected.

The layout window serves as the interface for making changes to a panel or pop-up box. The original panel and any other related windows that belong to the panel are hidden during layout mode. These windows are hidden to reduce confusion and clutter and will reappear when the user exits layout mode and resumes normal operation.

Like the other panels, the layout window has a caption, menu bar, work space and sizable borders. The caption identifies both the name of the panel being modified and the *User Group* to which these changes will apply.

Terminology

Control

This refers to an item on the screen. This could be a group box, a field label, the entry portion of a field, a user defined label, a button, etc.

Working in Layout Mode

There are many different types of changes that can be made to an existing panel or pop-up box. Each of these changes are effected by using the appropriate command during layout mode. These commands can be accessed in a variety of ways - via the menu bar, the tool palette, and/or the mouse. Keep in mind that not all commands can be accessed through all three avenues.

The available customization commands can be grouped into two basic families - panel level and control level commands - according to the granularity of the changes they effect. As their names imply, panel level changes affect the panel as a whole, and control level changes only affect individual controls on the panel. In addition, there is a group of operational commands that affect how layout mode operates.

Selecting Controls

Controls must first be selected before they can be manipulated by using other commands. Selected controls are marked by the black dots that reside in their corners. There are a variety of methods for selecting controls. To select just a single control, click once on the control. To select multiple controls, users can either shift-click with the mouse on the desired controls or drag the mouse around the set of controls. Once a group of controls has been selected, individual controls can be unselected by shift-clicking on those controls that are to be removed from the selection set. To unselect all selected controls, a user can simply click on empty space in the panel. If you select *Edit* and *Select All* from the menu bar, all controls on the panel are selected.

Obtaining Information about a Control

From the Customizing Panel Template panel a user can obtain information about a control by right-clicking on the desired control and choosing *Description* from the pop-up menu. Information about the control's type, identifier, and state are displayed in a message box. This information is especially useful when attempting to diagnose or report problems that result from customization.

Changing a Control's Properties

There are many different types of controls used in the system (i.e. static controls, check boxes, edit fields, dropdown lists, date controls, etc.) Each control type has a specific purpose and possesses its own set of properties that can be modified. Users can change a control's properties through a specific properties pop-up box that is accessed from the Customizing Panel Template panel.

Hidden Controls

By default the hidden controls will not be displayed on the Customizing Panel Template panel. To view the hidden controls, select *Layout* and *Show Hidden Controls* from the menu bar. Dashes will be displayed around each hidden control to indicate that it is a hidden control.

Access

- From the specific panel or pop-up box that you want to customize, right click within the entry area of the screen and select the *Change screen size/tabs* menu option.
- From the specific panel or pop-up box that you want to customize, right click within the entry area of the screen and select the *Change general screen layout* menu option.

Menu Bar Choices

File	Edit	Layout
Save	Select All	Align> Left
Exit	Properties	Right
	Default > Panel	Up
	Control/s	Down
	Change Tab Order	Horizontal Centers
	Change Panel Title	Vertical Centers
	Undo	Same Size > Height
		Width
		Both
		Center> Vertically
		Horizontally
		Bring to Front
		Send to Back
		Tool Palette
		Show Hidden Controls

File/Save

Saves the customization changes made to the panel.

File/Exit

Closes the Customizing Panel Template panel. If there are any unsaved changes to the template, you will be prompted to save the changes before returning to normal operation. Any changes to the panel or pop-up box will not be reflected until the panel or pop-up box is reloaded.

Edit/Select All

Selects all controls on the panel to allow the user to customize all controls at once.

Edit/Properties

Displays the appropriate Properties pop-up box to allow the user to view and update the properties for the control. This menu option is disabled if there is more than one control selected.

Edit/Default/Panel

Defaults the panel to a default state.

Edit/Default/Control/s

Defaults the selected control(s) back to a default state.

Edit/Change Tab Order

Displays the Change Tab Order pop-up box to allow the user to change the tab stops for the panel or pop-up box.

Edit/Change Panel Title

Displays the Change Panel Title pop-up box to allow the user to change the title for the panel or pop-up box.

Edit/Undo

Undoes the last action that was performed. This will restore the panel to the state it possessed immediately prior to performing the last command.

Layout/Align

Aligns the selected controls left, right, up, down, horizontally, or vertically. These menu options are disabled if there are less than two controls selected.

Layout/Same Size

Changes the selected controls to be the same size either horizontally, vertically, or both. These menu options are disabled if there are less than two controls selected.

Layout/Center

Centers the selected control either horizontally or vertically on the panel or pop-up box.

Layout/Bring to Front

Moves the selected control(s) to the foreground.

Layout/Send to Back

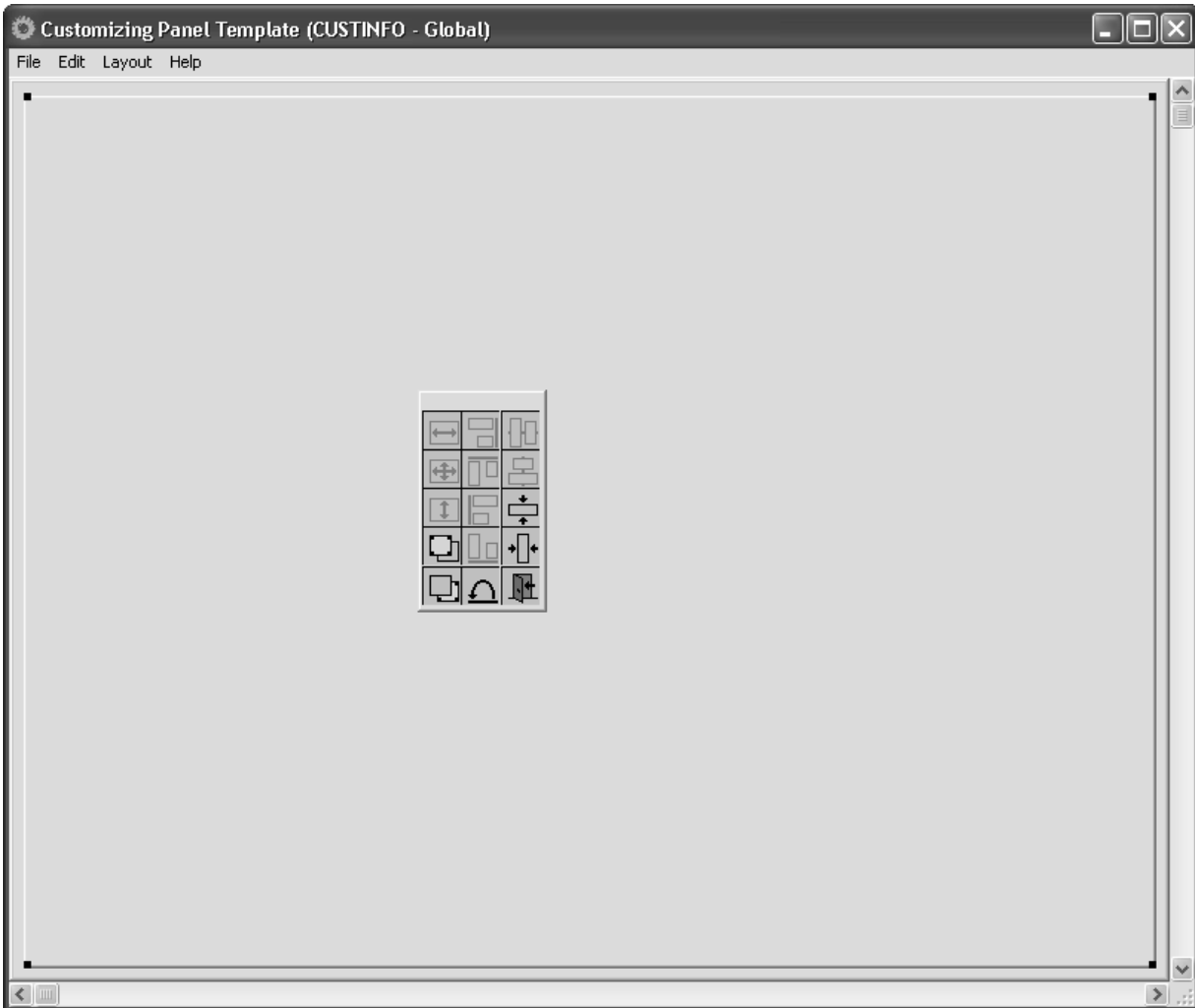
Moves the selected control(s) to the background.

Layout/Tool Palette

If there is a checkbox in front of this menu option, it means that the tool palette is displayed.

Layout/Show Hidden Controls

Displays all hidden controls on the panel or pop-up box with dashes around the control.

Panel Layout (For Change Screen size/tabs)

From this panel you will use specific menu options at the top of the panel or double click within the panel to access tab properties.

Panel Layout (For Change General Screen Layout)

This example is from the Main tab of the Account Information panel. Note that there is a grey area on the panel. This is the address related information which is customized separately using a specific menu option when you access screen customization.

From this panel you will use specific menu options at the top of the panel, right click menu options, or double click on specific controls to access the properties for the control.

Right Click Menu Options (Right Click in Open Area in Panel)

Add Field from Another Tab

Displays the Add Field(s) from Another tab pop-up box.

Add User Label

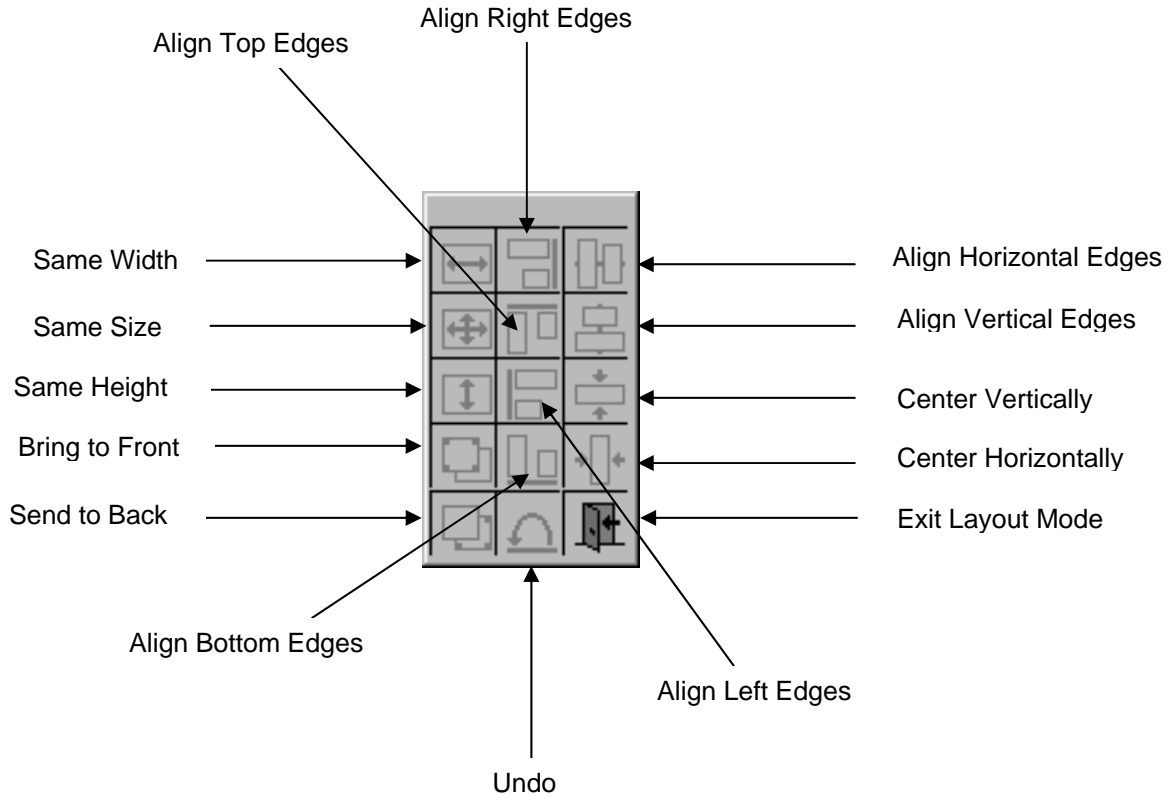
Adds a single line edit control to be used as a user defined label.

Add Multi Line User Label

Adds a multi line edit control to be used as a user defined label.

Tool Palette

To make selecting some common layout actions more accessible, the layout window also provides a tool palette. This tool palette contains buttons that can be used to choose various commands. The tool palette can be moved anywhere on the desktop and will always reside on top of the layout window. As an option, a user can hide the tool palette from view by selecting Layout and Tool Palette from the menu bar. The palette can be restored to view by using the same menu choice. The aligning edge or center is taken as the leftmost, rightmost, uppermost, lowest or centermost dimension from all the selected controls, respectively.



Change the Title of a Panel or Pop-Up Box

You can change the title of a panel or pop-up box. This may be beneficial if specific terminology is used within your organization that you do not want to change.

Access

Screen With Tabs

From the specific panel or pop-up box with tabs that you want to customize, right click within the entry area of the screen and select the *Change screen size/tabs* menu option. The Customizing Panel Template panel is displayed. Then select *Edit* and *Change Panel Title* from the menu bar.

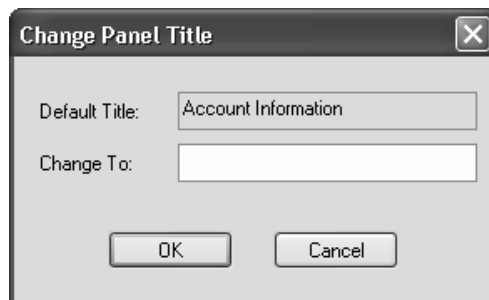
Screen Without Tabs

From the specific panel or pop-up box with tabs that you want to customize, right click within the entry area of the screen and select the *Change general screen layout* menu option. The Customizing Panel Template panel is displayed. Then select *Edit* and *Change Panel Title* from the menu bar.

Change Panel Title Pop-Up Box

This pop-up is displayed when a user selects *Edit* and *Change Panel Title* from the menu bar of the Customizing Panel Template panel.

Pop-Up Box Layout



Pop-Up Box Elements

Default Title

Displays the system defined name for the panel or pop-up box.

Change To

The new title that will be displayed for the selected *User Group*.

Pop-up Button Controls

OK

Saves the current changes and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Change Size of Screen with Tabs or Change Tabs

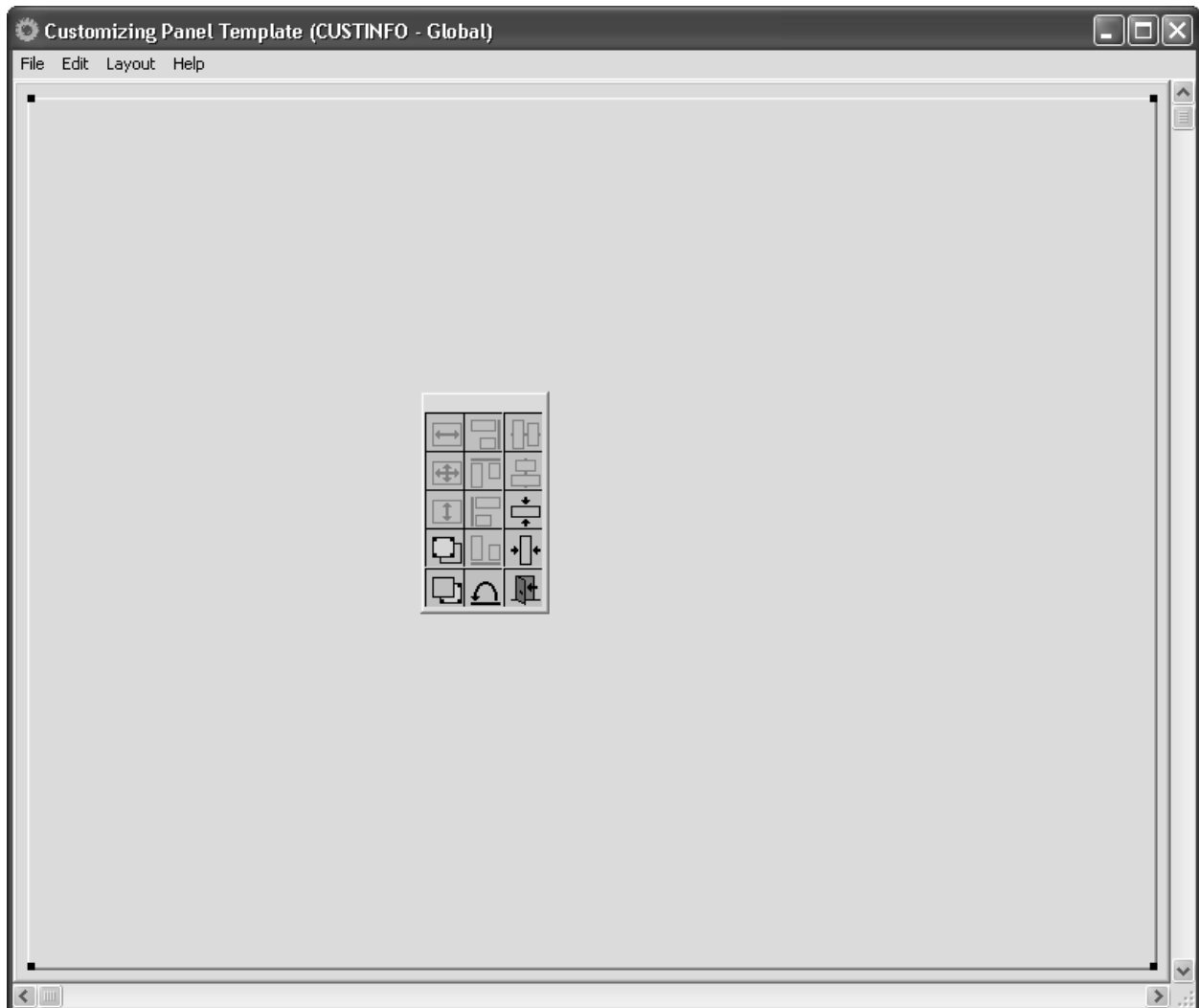
You can make a panel larger or smaller. You can change the name of a tab, change the order of the tabs, or hide a tab.

The Customizing Panel Template panel appears differently depending on which customization menu option was selected. For this purpose it is a blank screen.

Access

From the specific panel or pop-up box with tabs that you want to customize, right click within the entry area of the screen and select the *Change screen size/tabs* menu option. The Customizing Panel Template panel is displayed.

Panel Layout



- To change the size of the screen, using your mouse, drag the border of the panel to make it either larger or smaller. If you are making the panel larger, you must make the outermost border of the panel larger, and then make the inside larger.
- To change a tab name, change the order of the tabs, or hide a tab, double click within the panel. The Tab Properties pop-up box is displayed.

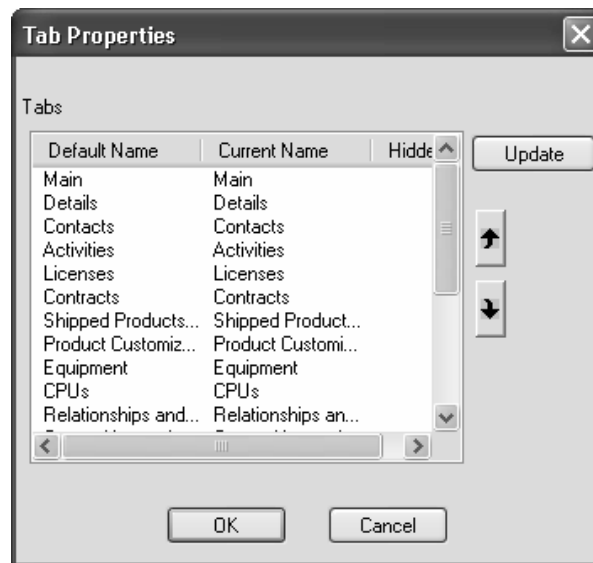
Tab Properties Pop-Up Box

This pop-up box displays a list of the tabs for the specific panel or pop-up box that includes the system defined tab name, the customized tab name, and whether the tab is hidden. There are also arrows that allow the user to move the tabs into a specific order. From here you can access the Change Tab Properties pop-up box to modify the tab.

Access

To access this pop-up box double click within the appropriate Customizing Panel Template panel.

Pop-Up Box Layout



Pop-Up Box Elements

Tabs List

Displays a list of the tabs for the specific panel or pop-up box that includes the system defined tab name, the customized tab name, and whether the tab is hidden.

List Box Button Controls

Update

Displays the Change Tab Properties pop-up box for the tab selected in the list box.

Up and Down Arrows

Moves a tab up or down in the list to define a specific order in which the tabs will be displayed on the panel.

Pop-up Button Controls

OK

Closes the Tab Properties pop-up box.

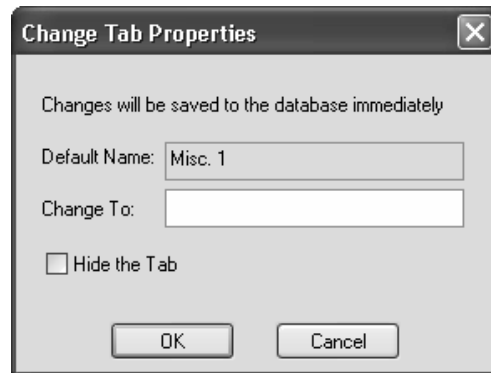
Change Tab Properties Pop-Up Box

From this pop-up box you can modify the tab name or hide the tab for the selected *User Group*.

Access

To access this pop-up box, from the Tab Properties pop-up box select the tab in the list box and click the *Update* button.

Pop-Up Box Layout



Pop-Up Box Elements

Default Name

Displays the system defined tab name.

Change To

The new tab name that will be displayed for the selected *User Group*.

Hide the Tab

If this checkbox is checked, the tab is hidden from the selected *User Group*.

Pop-up Button Controls

OK

Saves the current changes and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Standard Field Labels and User Defined Labels

Each field has a label that identifies the purpose of the field. You can change the name of a field label and you can change the color of a field label. A field label can also be hidden.

Some labels are made green by RTI. These labels can be used as hyperlinks to other panels.

You can add user defined single line or multi-line labels to provide additional information or instructions. HTML can be used in the multi-line user labels to display text or a picture.

Access

- To change the name of a field label, change the color of a label, or hide a label, from the Customizing Panel Template panel double click on the specific label.
- To define a specific hyperlink for a label, from the Customizing Panel Template panel double click on the green hyperlink label.
- To add a single line user defined label, right click within the Customizing Panel Template panel and select *Add User Label* from the menu pop-up. Then double click on the label to change the name.
- To add a multi-line line user defined label, right click within the Customizing Panel Template panel and select *Add Multi Line User Label* from the menu pop-up. Then double click on the label to change the name.

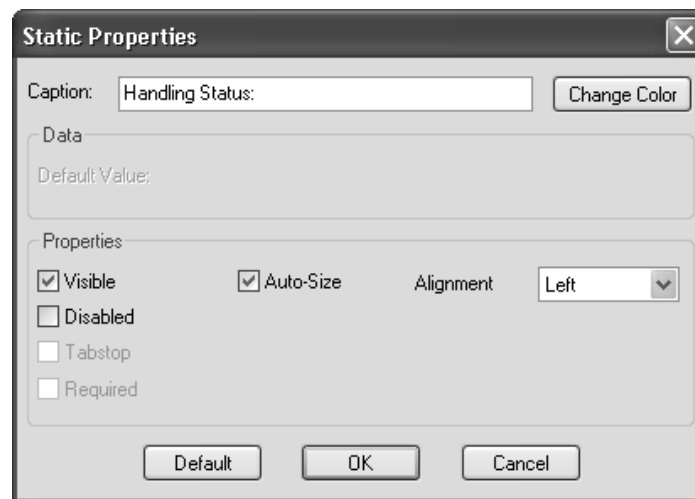
Static Properties Pop-Up Box (For Field Label/Single Line User Defined Label)

This pop-up box is used to modify a field label or a single line user label, or to hide a label.

Access

- To add a single line user defined label, right click within the Customizing Panel Template panel and select *Add User Label* from the menu pop-up.
- To access this pop-up, from the Customizing Panel Template panel double click on the specific field or single line user label.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the label as it appears on the screen. It should be noted that certain static controls within the system are reserved for internal use and cannot have their text changed. Reserved static controls will have a *Caption* that displays (Reserved) on the Customizing Panel Template panel.

Change Color button

Displays the Color pop-up box that allows the user to select another color for the label.

Visible

If checked, indicates that the label is visible on the screen.

Disabled

If checked, indicates that the label is displayed on the screen but it appears gray to indicate its disabled state.

Auto-Size

If checked, indicates that the control will automatically adjust its size to exactly match the width and height of the text displayed.

Alignment

Indicates that the text for this control should be either left, right, or center justified.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the label and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

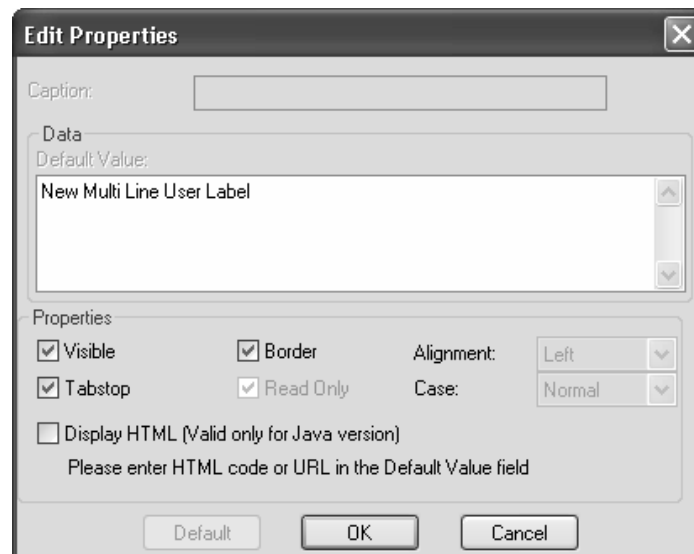
Edit Properties Pop-up Box (For Multi-Line User Label)

Multi-line labels can be used to provide additional information or instructions. HTML can be used in these labels to display text or a picture. This pop-up box is used to modify a multi-line user label and define specific attributes for the label.

Access

- To add a multi-line line user defined label, right click within the Customizing Panel Template panel and select *Add Multi Line User Label* from the menu pop-up.
- To access this pop-up, from the Customizing Panel Template panel double click on the specific multi-line user label.

Pop-up Box Layout



Pop-Up Box Elements

Default Value

The text, HTML code, or URL that will be used to display text or a picture for this user label. Only text can be used for the Windows client.

Visible

If checked, indicates that the field is visible on the screen.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tap stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Display HTML

Indicates that HTML will be used to display the text or picture. If this is checked, the HTML code or a URL must be entered in the Default Value field. This is only valid for the Java client.

Border

Indicates that a border should be placed around the text or picture.

Alignment

Indicates that the text for this field should be left, right, or center justified.

Case

Indicates that the text entered into this field should be in upper, lower, or normal (mixed case) case.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

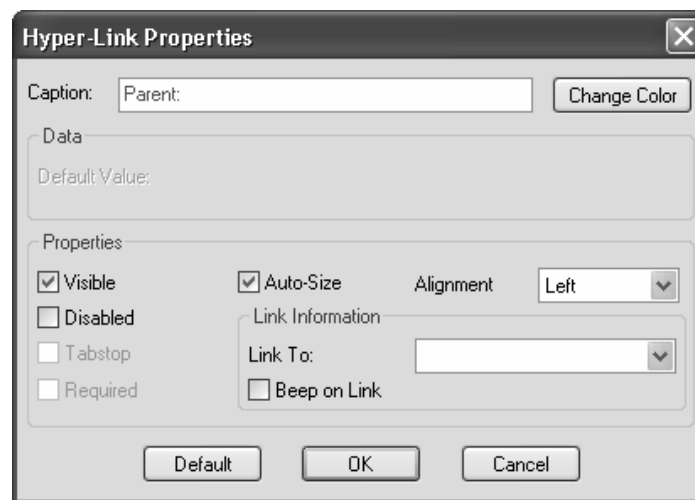
Hyper-Link Properties Pop-Up Box

Hyperlinks allow the user to access another panel by clicking on a field label. A hyperlink appears green on the screen. Your organization can select the panel that is displayed from a list of available panels. This pop-up box allows you to modify a hyperlink label and define specific attributes.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific green hyperlink label.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the hyperlink field as it appears on the screen.

Change Color button

Displays the Color pop-up box that allows the user to select another color for the label.

Visible

If checked, indicates that the hyperlink is visible on the screen.

Disabled

If checked, indicates that the hyperlink is displayed on the screen but it cannot be used to open another panel. It appears gray to indicate its disabled state.

Auto-Size

If checked, the hyperlink automatically adjusts its size to the minimum space required to fully display its associated text and check box.

Alignment

Indicates that the text for this control should be either left, right, or center justified.

Link To

The panel that will be displayed when the user clicks on the hyperlink.

Beep on Link (checkbox)

If checked, the system will beep when the user clicks on the hyperlink.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the hyperlink label and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Checkboxes, Radio Buttons, Edit Fields and Dropdowns

Checkbox, radio button, edit, and dropdown controls may be displayed on a panel or pop-up box. Specific attributes for each control can be defined and a particular pop-up box is provided to modify each control.

For many panels miscellaneous checkboxes, edit fields, and dropdowns are available on a miscellaneous tab and can be moved to another tab.

Access

To access the appropriate pop-up box, from the Customizing Panel Template panel double click on the specific control.

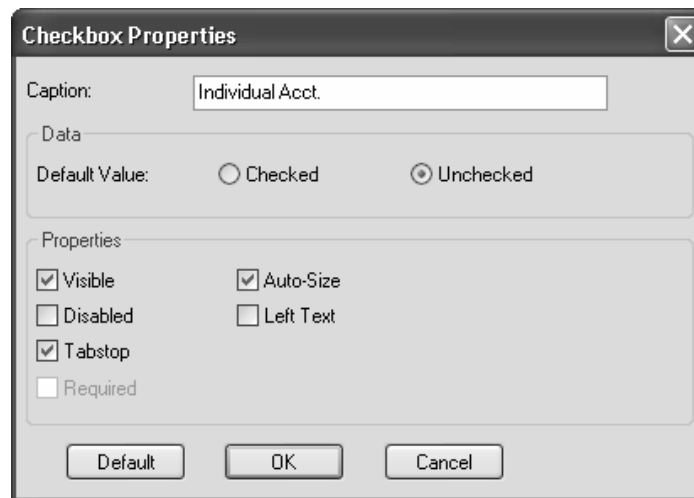
Checkbox Properties Pop-Up Box

You can change the label and several attributes of a checkbox field.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific checkbox.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the checkbox as it appears on the screen.

Default Value

The default value of the checkbox; either *Checked* or *Unchecked*.

Visible

If checked, indicates that the checkbox is visible on the screen.

Disabled

If checked, indicates that the field is displayed on the screen but it cannot be updated. The text will appear gray.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Auto-Size

If checked, the field will adjust its size to the minimum space required to fully display its associated text and check box.

Left Text

If checked, indicates that the text associated with the checkbox will be placed on the left side of the checkbox. If this box is not checked the text will be on the right side of the checkbox.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the checkbox field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

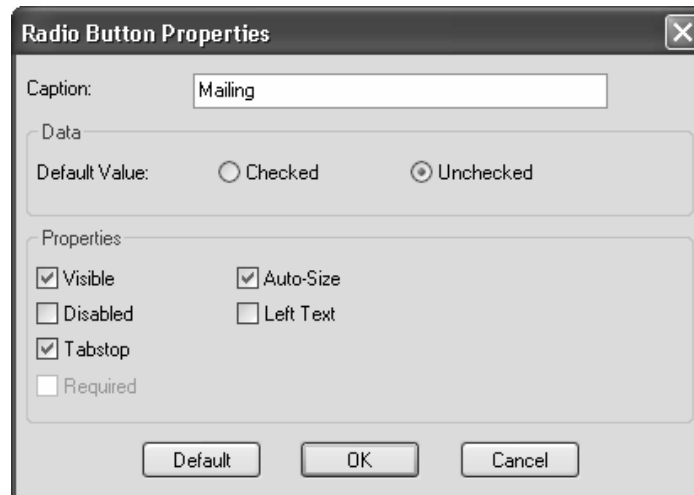
Radio Button Properties Pop-Up Box

Radio buttons are used to provide multiple selection options for a field. Typically, selection of one option is required. You can change the label and a number of attributes for a radio button.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific radio button.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the radio button as it appears on the screen.

Default Value

The default value of the radio button; either *Checked* or *Unchecked*.

Visible

If checked, indicates that the radio button is visible on the screen.

Disabled

If checked, indicates that the field is displayed on the screen but it cannot be updated. The text will appear gray.

Tabstop

If checked, the radio button will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Auto-Size

If checked, the field will automatically adjust its size to the minimum space required to fully display its associated text and radio button.

Left Text

If checked, indicates that the text associated with the radio button will be placed on the left side of the radio button. If this box is not checked the text will be on the right side of the radio button.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the radio button field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

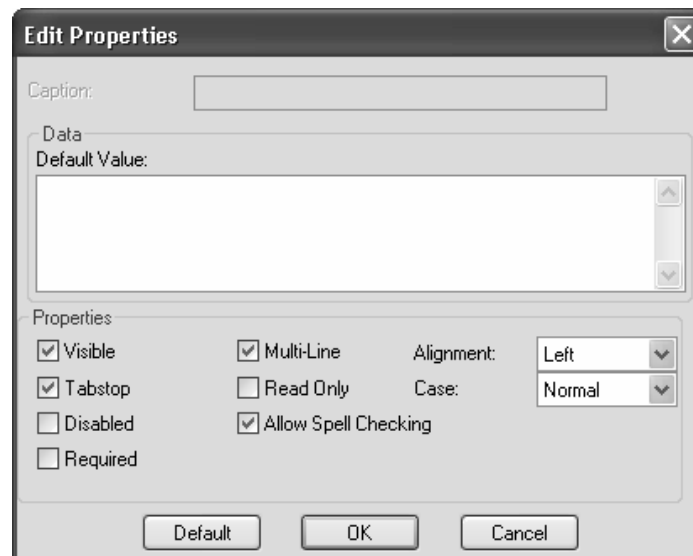
Edit Properties Pop-Up Box

You can define default text and change a number of attributes for an edit field. For some fields an option may not be available because it is actually controlled through the application.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific edit field.

Pop-Up Box Layout



Pop-Up Box Elements

Default Value

Text entered in this field will default into the edit field for initial entry. Depending upon additional customization of the edit properties, the user may or may not be able to update the text in the field.

Visible

If checked, indicates that the field is visible on the screen.

Disabled

If checked, indicates that the field is displayed on the screen but it cannot be updated. In addition, the value in a disabled field cannot be copied and pasted. Use the *Read Only* option to be able to copy and paste the value.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tap stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Required

If checked, data must be entered in the field before a user can save the panel.

Multi-Line

If checked, indicates that the text in the edit field can span multiple lines. Multi-line edit fields automatically word-wrap their displayed text and provide a vertical scroll bar when needed.

Read Only

If checked, indicates that the edit field is read-only.

Allow Spell Checking

If checked, indicates that the spell check functionality can be used on this field.

Alignment

Indicates that the text for this field should be left, right, or center justified.

Case

Indicates that the text entered into this field should be in upper, lower, or normal (mixed case) case.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

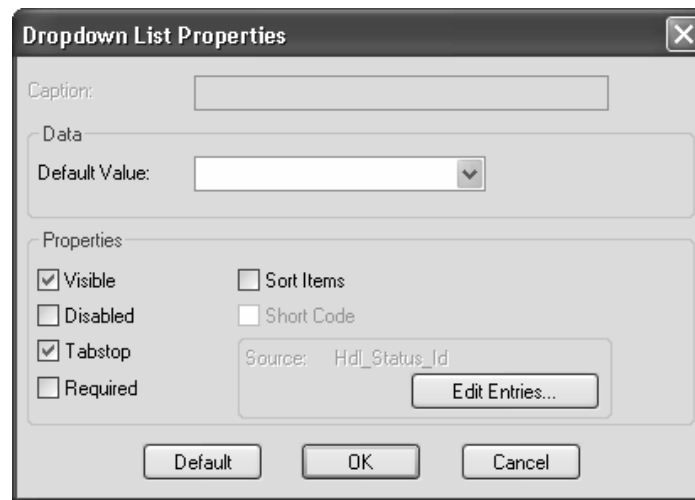
Dropdown List Properties Pop-Up Box (Code Value Fields)

A drop down list is used to display the values for a field where the values are predefined from the Maintain Codes/Code Types panel. You can define a default value and change a number of attributes for a code value dropdown field.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific code value dropdown field.

Pop-Up Box Layout



Pop-Up Box Elements

Default Value

The selection made from the drop down list in this field will default into the control for initial data entry. Depending upon additional customization of the edit properties, the user may or may not be able to update the text in the field.

Visible

If checked, indicates that the drop down list is visible on the screen.

Disabled

If checked, indicates that the field is displayed on the screen but it cannot be updated.

Tabstop

If checked, the drop down list will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Required

If checked, data must be entered in the field before a user can save the panel.

Sort Items

If checked, indicates that the items in the drop down list will be sorted.

Source

Identifies the *Code Type* in Maintain Codes/Code Types for this field.

Edit Entries button

Displays the Maintain Codes Type – Layout pop-up box to allow the user to add a new value or update existing code values for the code type indicated in the *Source* field.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* 'it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the dropdown field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

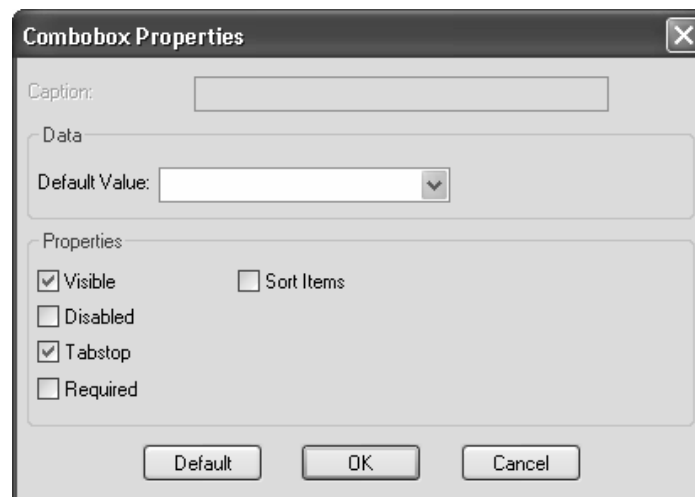
Combobox Properties Pop-Up Box

A combo box list field is used to display the values for a field where the values are predefined from some place other than the Maintain Codes/Code Types panel. For example, values for the *Account Type* field are maintained from the Account Types panel. You can define a default value and change a number of attributes for this type of dropdown field.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific combo box field.

Pop-Up Box Layout



Pop-Up Box Elements

Default Value

The selection made in this field will default into the control for initial data entry. Depending upon additional customization of the edit properties, the user may or may not be able to update the value in the field.

Default Value

Since combo boxes cannot have default values, the *Default Value* field is disabled.

Visible

If checked, indicates that the combo box is visible on the screen.

Disabled

If checked, indicates that the combo box is displayed on the screen but it cannot be updated.

Tabstop

If checked, the combo box will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Required

If checked, data must be entered in the field before a user can save the panel.

Sort Items

If checked, indicates that the items in the combo box will be sorted.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the combo box field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Other Controls

There are a number of other types of controls that may be displayed on a panel or pop-up box. For example date fields, the attachments box, and group boxes. Specific attributes for each control can be defined and a particular pop-up box is provided to modify each control.

Access

To access the appropriate pop-up box, from the Customizing Panel Template panel double click on the specific control.

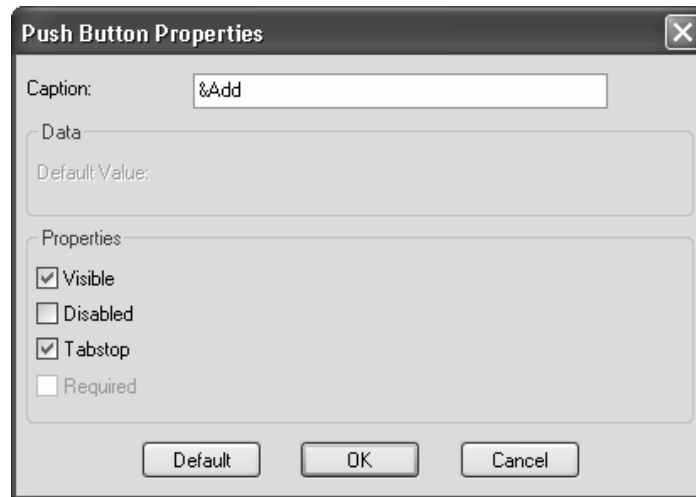
Push Button Properties Pop-Up Box

Push buttons are used to perform a specific action. You can change the label and several attributes of a button.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific button.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the button as it appears on the screen. The & identifies which character is used for the hot key. It is placed before the specific character.

Visible

If checked, indicates that the button is visible on the screen.

Disabled

If checked, indicates that the button is displayed on the screen but cannot be used. The label appears gray.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the button and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Date Properties Pop-Up Box

You can change a number of attributes of a date field.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific date field.

Pop-Up Box Layout



Pop-Up Box Elements

Visible

If checked, indicates that the field is visible on the screen.

Disabled

If checked, indicates that the field is displayed on the screen but it cannot be updated. In addition, the value in a disabled field cannot be copied and pasted. Use the *Read Only* option to be able to copy and paste the value.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Required

If checked, data must be entered in the field before a user can save the panel.

Calendar

If checked, a calendar image is displayed next to the date field. If the user clicks on the *Calendar*, a pop-up is displayed for the user to select a year, month, and date. By default, read only date controls do not display a calendar image next to the field.

Read Only

If checked, indicates that the date field is read-only.

Display

Indicates that the date in the field should be displayed normally (regular font), LED, or as a Counter.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* 'it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the field and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

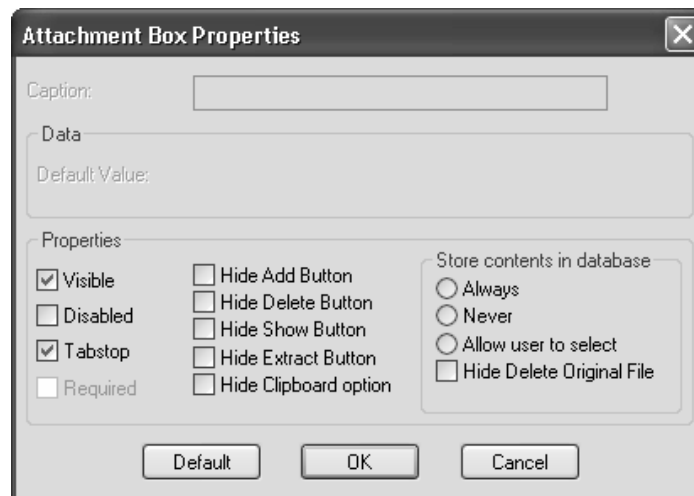
Attachment Box Properties Pop-Up Box

The attachment boxes in the system can be customized based your requirements.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific attachments box.

Pop-Up Box Layout



Pop-Up Box Elements

Visible

If checked, indicates that the attachment box is visible on the screen.

Disabled

If checked, indicates that the attachment box is displayed on the screen but new attachments cannot be added and existing attachments cannot be accessed.

Tabstop

If checked, the attachment box will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Hide Add Button

If checked, indicates that the *Add* button will not be displayed.

Hide Delete Button

If checked, indicates that the *Delete* button will not be displayed.

Hide Show Button

If checked, indicates that the *Show* button will not be displayed.

Hide Extract Button

If checked, indicates that the *Extract* button will not be displayed.

Hide Clipboard option

If checked, indicates that the user will not have the option of storing the contents of the Clipboard in the database.

Store contents in database

This group box provides options related to adding a file attachment.

Always

If selected, all attachments will be stored in the database.

Never

If selected, attachments will never be stored in the database.

Allow user to select

If selected, users will have the option of whether or not they wish to store the file attachment in the database.

Hide Delete Original File

If checked, the Delete Original File checkbox will not be displayed.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the attachment box and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

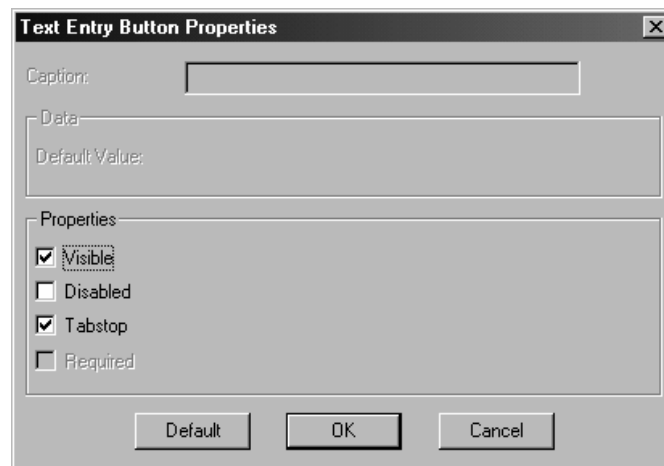
Text Entry Button Properties Pop-Up Box

Text entry buttons are the expand buttons that are used to open panels that can be used to view or edit large amounts of text. They are typically used in conjunction with a multi-line edit field. You can modify several attributes for a text entry button.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific expand button.

Pop-Up Box Layout



Pop-Up Box Elements

Visible

If checked, indicates that the button is visible on the screen.

Disabled

If checked, indicates that the button is displayed on the screen but cannot be used.

Tabstop

If checked, the field will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Pop-up Button Controls

Default

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the button and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

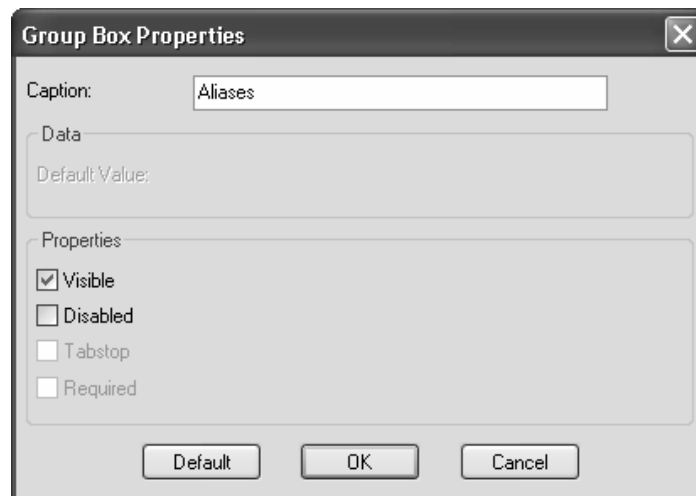
Group Box Properties Pop-Up Box

You can change the label for a group box and hide a group box.

Access

To access this pop-up, from the Customizing Panel Template panel double click on the specific group box.

Pop-Up Box Layout



Pop-Up Box Elements

Caption

The name of the group box as it appears on the screen.

Visible

If checked, indicates that the group box is visible on the screen.

Disabled

If checked, indicates that the group box is displayed on the screen but appears gray to indicate its disabled state.

Pop-up Button Controls

Default

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the group box and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Field Location and Size

Controls can be moved to new locations on a specific screen. In addition, controls can be moved from one tab to another for the tabs within in the virtual dialog. For example, the Main, Details, and Misc. tabs.

When moving controls, make sure that you move all of the pieces related to the specific control. For example the label, the entry portion, buttons, a group box, etc. You want to be careful not to mix up the pieces between different controls.

A control can also be made smaller or larger. However, if a drop down list or combo box list is too small, the field values will not be displayed in the list.

Move a Field on the Same Screen

Controls can be moved to new locations on a screen by selecting them and dragging them to a new location with the mouse. You can also use the arrow keys to move one or more selected controls.

Add a Field From Another Tab

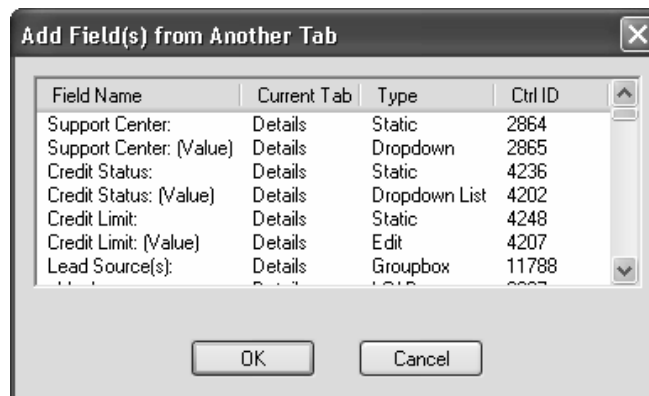
Controls can also be moved from one tab to another. However fields can only be moved between the tabs within in the virtual dialog. For example, the Main, Details, and Misc. tabs.

When moving fields between tabs, make sure that you select all of the pieces related to the specific control. For example, the label, the value, buttons, and maybe a group box.

Access

To move a field from another tab to the current tab, right click within an open area on the Customizing Panel Template panel and select *Add Field from Another Tab* from the menu pop-up.

Pop-up Box Layout



Pop-Up Box Elements

List Box

A list of the available fields by tab are displayed in the list box. One or more fields can be selected. Select the label and the entry portion of the field at the same time.

Pop-up Button Controls

OK

Saves the changes made to the button and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Align and Resize Fields

Aligning Controls

A group of selected controls can be aligned against a common edge or center by selecting *Layout* and *Align* and the appropriate option from the menu bar, or by using the appropriate option from the tool palette. There are six different alignment commands. These commands are described in the Tool Palette discussion in this section.

Handling Overlapped Controls

In crowded situations, there may be times when there is no choice but to overlap controls. To ensure that the controls overlap in the correct order, you can use commands to send a control to the background by selecting *Layout* and *Send to Back* from the menu bar or bring it to the foreground using the *Bring to Front* command found in the same location. There are also corresponding options on the tool palette for these commands. Remember that these commands will have an effect on the panel's tab order. While users can adjust the tab order as necessary to fix any side effects that result from these commands, care should still be taken when manipulating overlapping controls.

Changing a Control's Size

A control can be made smaller or larger by selecting it, and then dragging one of its corners to resize the control. If a drop down list or combo box list is too small, the field values will not be displayed in the list.

Making Controls the Same Size

A group of selected controls can be made to have the same width, height or both. These commands can be executed by selecting *Layout* and *Same Size* and the appropriate option from the menu bar or through the tool palette. The dimensions used to size the selected controls are determined by examining the group of selected controls and taking the largest width or height as determined by the current command.

Change Cursor Tab Order

The cursor tab order is used when navigating between fields on a screen using the Tab key. Typically, the ordering of fields on a screen follows a left to right, top to bottom progression. As screen customization change are made, it may become necessary to modify the tab order for the fields on the screen.

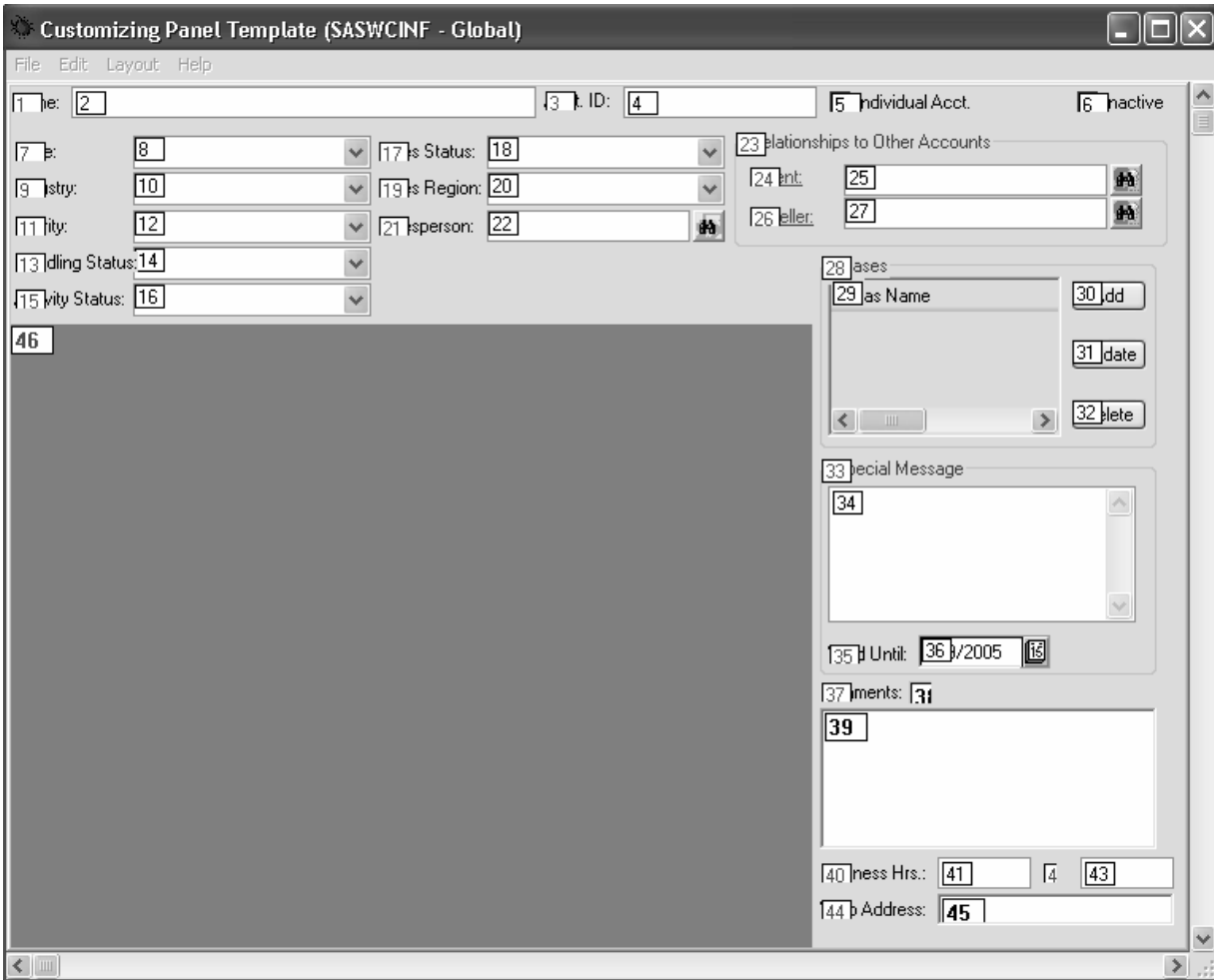
When changing the cursor tab order, you will notice that the controls have been numbered. A control's number indicates its position in the tab order. The color of a control's number represents whether or not that control can actually have a tab stop property set. Controls that do not have their tab stop property set are bypassed when the Tab key is used to navigate between controls. A black number indicates that a control's tab stop property is set, while a red number indicates that it is not.

To set a new cursor tab order, shift-click on a control to establish a new starting point. This will have the effect of setting the starting control's tab position to one and clearing the values from the other controls. The rest of the order can be set by clicking on the controls in the order they should appear. The process can be restarted at any time by shift-clicking on a new starting control and repeating the process. Clicking on a control that already has its position set (i.e. it is displaying a number) will clear its value and decrement the position of all the controls that follow this one in the tab order. Clicking on a control that does not have its position set (i.e. it is not displaying a number) will place the control at the end of the current tab order.

Access

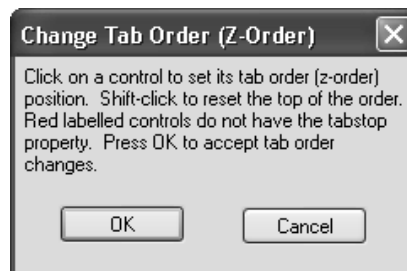
To access this function, from the Customizing Panel Template panel, select *Edit* and *Change Tab Order* from the menu bar.

Panel Layout



Note the numbers that are assigned to each control.

Pop-Up Box Layout



Pop-Up Box Elements

Pop-up Button Controls

OK

Accepts the tab order and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

List Boxes

List boxes are used to display multiple items in a columnar format. Specific properties can be defined for the overall list box, and specific columns in the list box can be renamed or hidden. Typically you will want to hide the columns that are not being used.

You can identify a single label for a field to be used on panels and list boxes, or you can define one label to be used on the panels and pop-ups, and a separate label to be used in the list boxes. Separate labels can be beneficial if you want to shorten the label in the list boxes for viewing purposes. The label changes at the system level are specific to the table for which they were made.

Not all labels can be changed or should be changed at the system level. Some may need to be changed at the panel level. Refer to the Change Field Label at System Level topic in this section.

List Box Properties Pop-Up Box

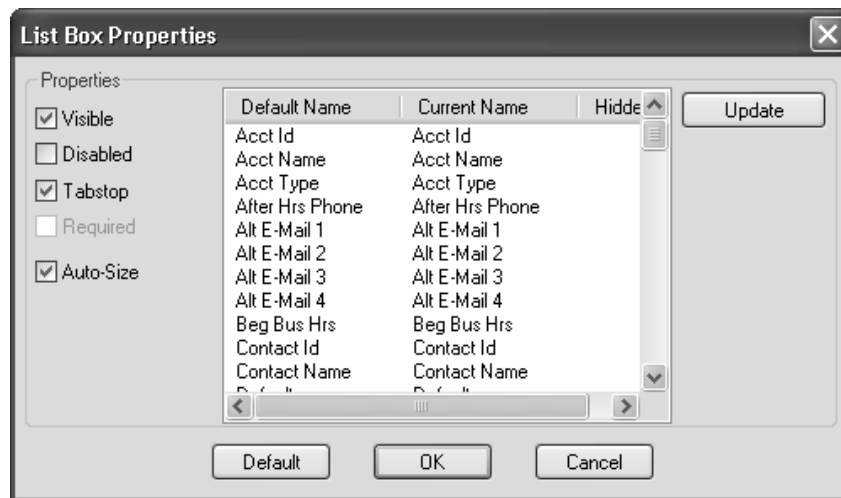
This pop-up box is used to modify the attributes for a list box and to access the Change Column Properties Pop-Up Box for a specific column.

You can select multiple columns in the *Columns* list in order to hide multiple columns at one time.

Access

To access this pop-up, from the Customizing Panel Template panel double click within the list box.

Pop-Up Box Layout



Pop-Up Box Elements

Visible

If checked, indicates that the list box is visible on the screen.

Disabled

If checked, indicates that the list box is displayed on the screen but is a read-only control.

Tabstop

If checked, the list box will become a tab stop on the panel. You can define the order of the tab stops by selecting *Edit* and *Change Tab Order* from the menu bar.

Auto-Size

If checked, the list box will automatically adjust its size to the minimum space required to fully display the list box.

Column List

This list displays the columns that are available in the list box.

List Box Button Controls**Update**

Displays the Change Column Properties pop-up box to allow the user to update the selected item(s) in the list box.

Pop-up Button Controls**Default**

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the control will be set back to the system default.

OK

Saves the changes made to the list box columns and closes the pop-up box.

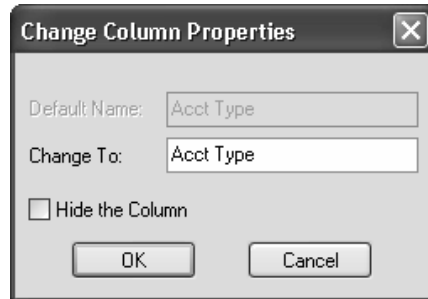
Cancel

Closes the pop-up box without saving any changes.

Change Column Properties Pop-Up Box

This pop-up box allows you to change the name of a column as it appears in a list box, or hide one or more columns in the list box.

Pop-Up Box Layout



Pop-Up Box Elements

Default Name

Indicates the original name given to the column in the list box.

Change To

Indicates the new name of the column in the list box.

Hide The Column

If checked, indicates that the column will not be available to users in the selected User Group for list box customization.

Pop-up Button Controls

OK

Saves the changes made and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Restoring to Default Control or Default Panel

If the customization is not for the 'Global' *User Group* it sets the selected control or panel back to the default for the 'Global' *User Group*. If the customization is for the 'Global' *User Group* the control or panel will be set back to the system default.

When you restore a control or a panel you will receive a pop-up message to verify that you want to continue. If you continue, the change is saved immediately.

Restoring a Control to the Default State

Just as a screen can be restored to a default state, individual controls can be returned to a default state. Setting a control to its default state will erase only those changes that apply to the specified control while leaving everything else unaffected. This command can be accessed by selecting *Edit* and *Default* and *Control(s)* from the menu bar, or by right-clicking on the desired control and selecting the *Restore Control to Default* option from the pop-up menu.

Restoring a Panel to the Default State

A modified screen can be returned to a default state from the Customizing Panel Template panel by either selecting *Edit* and *Default* and *Panel* from the menu bar, or by right clicking in an open area and selecting *Restore Panel To Default* option from the menu pop-up. Restoring a panel to its default state will erase both current and saved changes.

Timer Control Options

The timer control can help facilitate time tracking for *CustomerFirst* users on incidents, problems, and tasks.



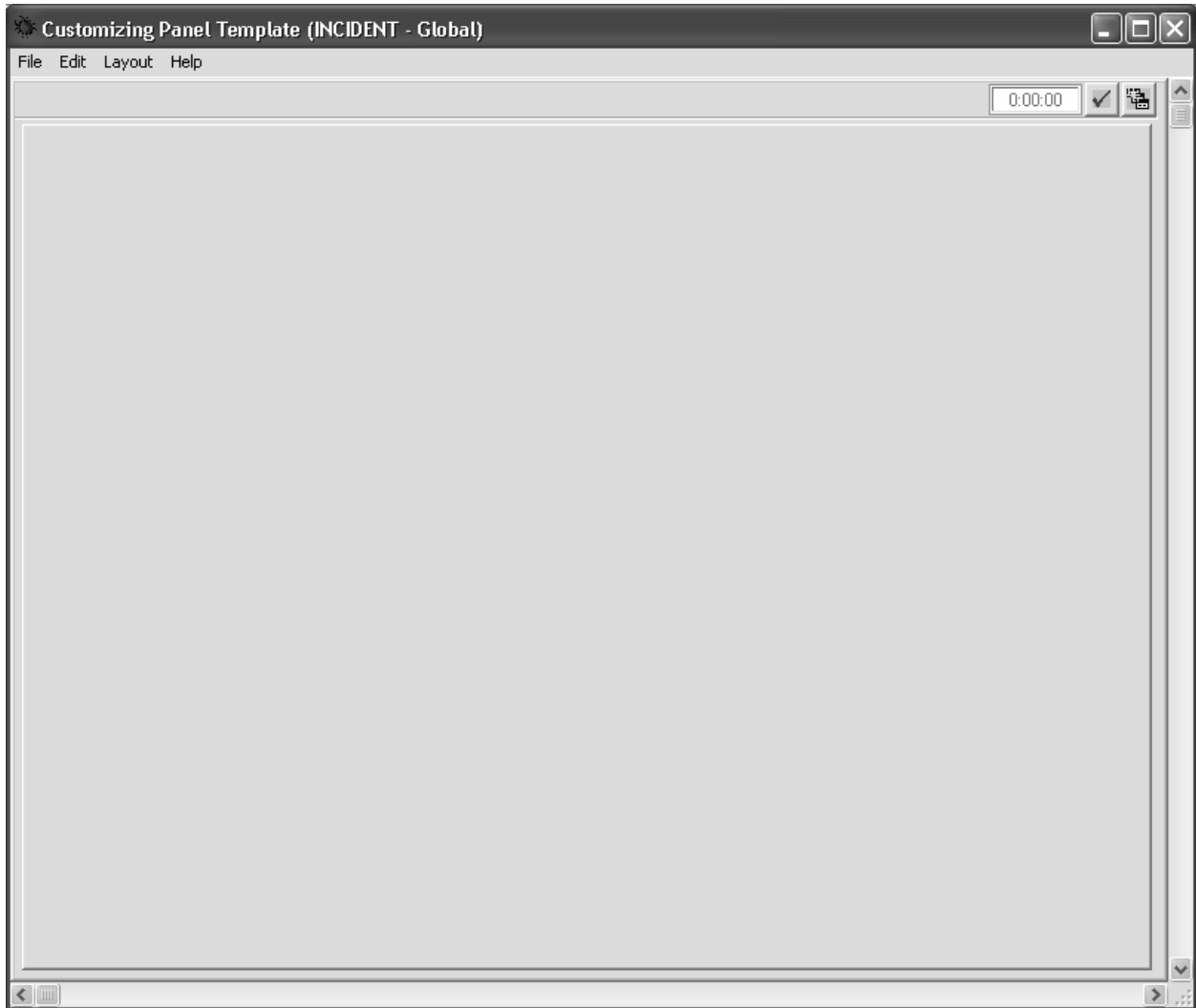
The timer control consists of an edit control and two buttons. The edit control displays the amount of elapsed time, and the user can modify its contents. The left button displays a check mark or an X, and is used to deactivate or activate the timer control. The right button displays a cascading sequence of windows, and is used to invoke a dialog which allows the user to activate timer controls residing on different panels. The timer control, once activated, accumulates time by the second.

Options for the timer control must be set for each panel individually from the Customizing Panel Template panel.

Access

From the specific panel that you want to customize the *Timer Control*, right click within the entry area of the screen and select the *Change screen size/tabs* menu option. The Customizing Panel Template panel is displayed. Double click on the *Timer Control* in the upper right corner.

Panel Layout

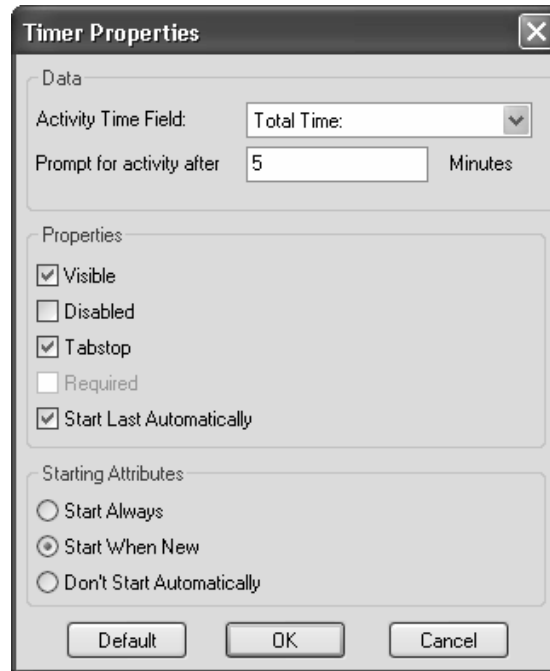


The *Timer Control* is displayed in the upper right hand corner.

Timer Properties Pop-up Box

This pop-up box allows you to define specific options for the *Timer Control*.

Pop-up Box Layout



Pop-Up Box Elements

Data

Activity Time Field

Identifies which field on the activity pop-up box the time should default to. If the '<<none>>' entry in the *Activity Time Field* list is selected, the *Timer Control* will not update any field on the activity panel.

For a task you can set the default to the time field selected for the associated object panel. For example, if the time for an incident task should default to the same time field that is defined for the Incident panel. A value of '<<Entity>>' is provided when customizing the *Timer Control* from the Task panel.

The system default is 'Total Time' but frequently it is changed. If the default is a value other than 'Total Time', you should set the option on the User Group Preferences panel to automatically calculate the *Total Time* field on the activity. The time displayed in the Department Time Summary panel, Summary tab of the Individual Time Summary panel, and some search results is taken from the *Total Time* field.

Prompt for activity after

Defines the number of minutes after which the user will be prompted to add an activity. The system default is '5'.

Properties

Visible

If checked, indicates that the *Timer Control* is visible on the screen. By system default this field is checked.

Disabled

If checked, indicates that the *Timer Control* is displayed on the screen but is a read-only control.

Tabstop

If checked, the *Timer Control* will become a tab stop on the panel. You can define the order of the tab stops by selecting Edit/Change Tab Order from the menu bar. By system default this field is checked.

Required

This attribute does not apply to the *Timer Control*, so this field has been disabled. Requiring the entry of time is controlled on the Set-Up Defaults panel.

Start Last Automatically

If this field is checked, when a *Timer Control* is deactivated, the last active timer control (if one exists) will be activated. By system default this field is checked.

Starting Attributes

Start Always

If selected, the *Timer Control* will automatically start whenever the panel upon which it resides is opened.

Start When New

If selected, the *Timer Control* will automatically start when a panel which displays a new object is opened (for example, when a new incident is opened). By system default this field is checked.

Don't Start Automatically

If selected, the *Timer Control* will not start automatically.

Pop-up Button Controls

Default

If this customization is not for the 'Global' *User Group* it sets the selected control back to the default for the 'Global' *User Group*. If this customization is for the 'Global' *User Group* the *Timer Control* will be set back to the system default.

OK

Saves the changes made to the *Timer Control* and closes the pop-up box.

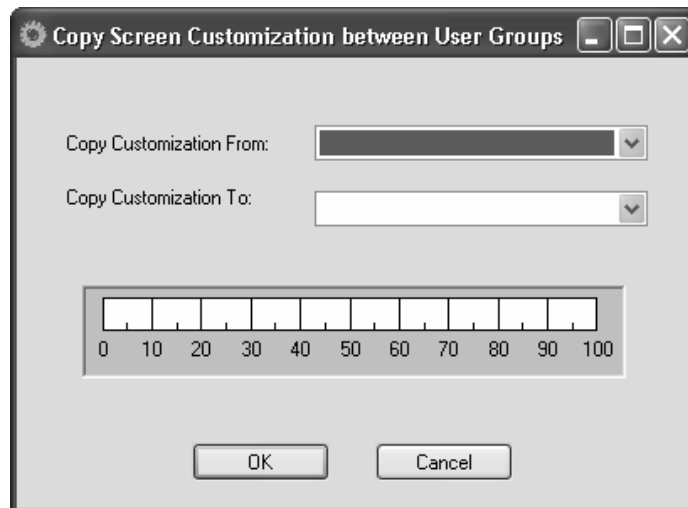
Cancel

Closes the pop-up box without saving any changes.

Copy Screen Customization between User Groups Pop-up Box

This pop-up box allows the user to copy screen customizations from one user group to another user group. This includes all screen customizations made through the Customizing Panel Template panel.

Pop-up Box Layout



Pop-up Box Elements

Copy Customization From

The user group that you want to copy the screen customizations from.

Copy Customization To

The user group that you want to copy the screen customizations to.

Pop-up Button Controls

OK

Saves the changes made and closes the pop-up box.

Cancel

Closes the pop-up box without saving any changes.

Section 12

TechSearch Setup & Maintenance

Section 12

TechSearch Setup & Maintenance

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Overview

TechSearch is a text search and retrieval engine that has been integrated with *CustomerFirst*, *WebFirst* and *SalesFirst*. It allows you to identify, index and search against various collections of external documents and/or database fields. It provides a mechanism for you to utilize the existing knowledge within your organization from within the system. A user can use the *TechSearch* panel to search for documents and/or database fields related to a particular word or group of words.

TechSearch Users

There is a *TechSearch User* checkbox field on the Company Personnel panel. This checkbox will indicate that the user should be able to access *TechSearch* when they log into *CustomerFirst* or *SalesFirst*. When a user logs into the system, their personnel record will be checked to see if they have access to *TechSearch*. If they do have access to *TechSearch*, the system will check to see if a license is available for the user. If there is a license available, the user will have access to the *TechSearch* functionality. If there is not a *TechSearch* license available, the user will receive the following message:

“At this time all TechSearch licenses are being used. You will not have access to TechSearch functionality during this session. Click OK to continue with access to all other functionality.”

By default none of the personnel will be identified as a *TechSearch User*. From the new Personnel List in System Administration you can mass update users to check/uncheck this option.

Use of Special Characters in a Search Term

TechSearch Stop File

In order for a special character to be treated as a standard character in a search term it must be defined in the *TechSearch* stop file (Fultext.stp). This file is located in the directory where the *TechSearch* Server was installed.

Some special characters are used by *TechSearch* for a specific purpose and cannot be treated as a standard character.

If a special character is not used by *TechSearch* for a specific purpose, and is not defined in the stop file, it is ignored in the search term.

Special Characters Defined in the Stop File

The following special characters have been defined in the *TechSearch* stop file (Fultext.stp) in order to be treated as a standard character. For example, Inc_History will not return Inc History.

@

\$
—

These appear in the stop file as PUN='@#\$_' or individually PUN='@' and PUN='#' etc. Each PUN statement must be on a separate line.

If you do not want one of these characters treated as a standard character, you can remove it from the *TechSearch* stop file.

Special Characters Used by TechSearch

The following special characters are used by *TechSearch* and cannot be treated as a standard character.

*
?
&
~
|
%
\
/

The following identifies how the text in the search term is used for searching purposes.

Search Text	Returns results that contain the word ...
apple	"apple"
appl*	"apple," "apples," "application," etc.
appl%	"apple," "apples," "application," etc.
tr??	"tree," "tray," "trap", etc.; not "trees" (Integers and special characters at the end are ignored. "Tree2" will be returned.)

apple & tree	"apple" and the word "tree" in any order
apple AND tree	"apple" and the word "tree" in any order
apple &~ tree	"apple" and not the word "tree"
apple AND NOT tree	"apple" and not the word "tree"
apple tree	"apple" or the word "tree"; or "apple" and the word "tree"
apple OR tree	"apple" or the word "tree"; or "apple" and the word "tree"
apple tree	"apple tree" as a single search term
apple & (tree red)	"apple" and the word "tree"; or "apple" and the word "red"; not "apple" alone
apple*tree	"appleatree", "applebtree" "appleabctree"
apple%tree	"appleatree", "applebtree" "appleabctree"

TechSearch Setup Panel

This panel is used to define the client connection information, and to add and maintain the libraries used by *TechSearch* for searching purposes.

TechSearch uses libraries for searching database fields and external documents. Libraries predefine the items that you can search against. A *Database* library must be predefined for each database field that you want to search against. An *External* library must be predefined for each external file that you want to search against.

Before users can search against a library it must be indexed. *TechSearch* uses the indexing process to identify a catalog all of the possible search terms contained in a library's documents. As new information is entered for a document in a library, the library must be re-indexed. The *TechSearch* Indexing Utility (RTIFTIDX.exe) provides a command line interface that you can use in conjunction with a scheduling tool to automate the indexing process.

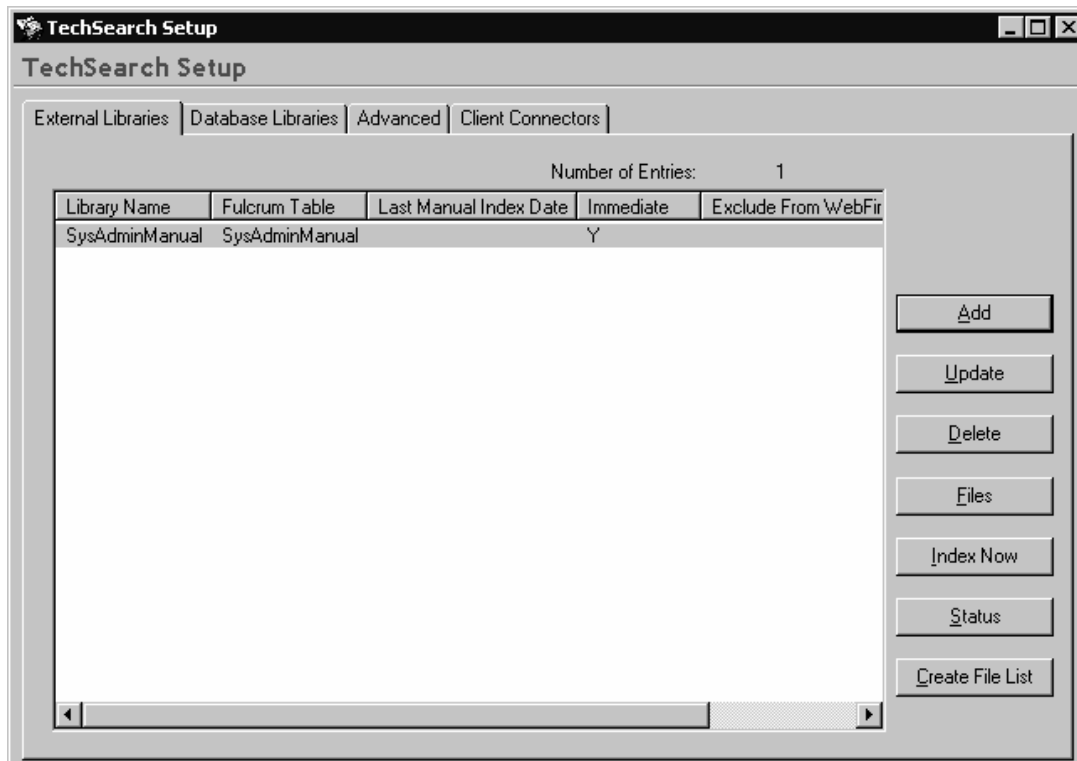
The configuration and maintenance for *TechSearch* must be completed on the machine where the *TechSearch* Server has been installed. This can be remote access to the machine.

External Libraries Tab

TechSearch allows users to search for information from various sources (i.e. FAQs, user manuals, white papers, etc.). These information sources are grouped into one or more search libraries. While it may be reasonable to have only one library for searching, most accounts will find it useful to organize their documents into multiple libraries that can be used as needed for different searching tasks.

IMPORTANT NOTE: The user must be logged into the *TechSearch* Server with the username and password that was entered for the client connector.

Panel Layout



Panel Elements

List Box

Displays a list of all the external libraries that have been defined.

Number of Entries

The number of external libraries in the list box.

List Box Button Controls

Add

Displays the Add External Library pop-up box to allow the user to enter a new external library.

Update

Displays the Add External Library pop-up box to allow the user to change the library *Description* for the selected library.

Delete

Removes the selected external library.

Files

Displays the Add/Remove Files from Library pop-up box to allow the user to maintain the files that are included in the selected external library.

Index Now

Displays the Index Library pop-up box to allow the user to manually index the selected external library.

Status

Displays the Library Status pop-up box to allow the user to check the indexing status of the selected library.

Create File List

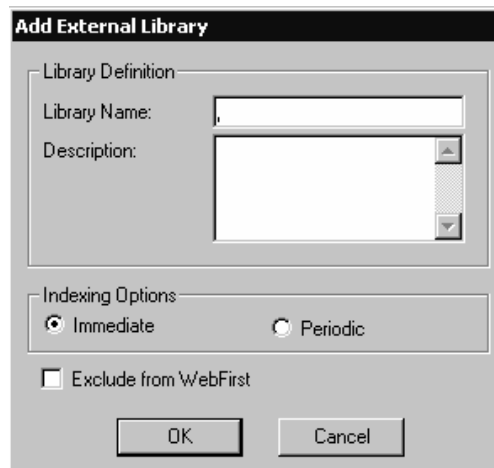
Displays the Save Library Name and File Location pop-up box to allow the user to save a list of the external libraries and related files.

Add External Library Pop-Up Box

This pop-up box allows the user to enter information related to a new external library.

Once a library has been added, the only property that can be changed is the *Description*.

Pop-Up Box Layout



Pop-Up Box Elements

Library Name

The name of the external library. The *Library Name* must begin with a letter and cannot contain any spaces. The *Library Name* cannot be changed once the library is saved.

Description

A user defined description of the external library.

Indexing Options

TechSearch uses the indexing process to identify and catalog all the possible search terms contained in a library's documents.

Immediate

If selected, the library's internal structures will be updated whenever a file is added to or removed from the library. This option is typically selected for External Libraries. In most cases, the performance costs of using *Immediate* indexing are rather low.

Periodic

If selected, the library's internal structures will only be updated when a user manually triggers the indexing process from the *TechSearch* Setup panel, or through a scheduled indexing process.

Exclude from WebFirst

If checked, the specific library will not be available from *TechSearch* in *WebFirst*.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

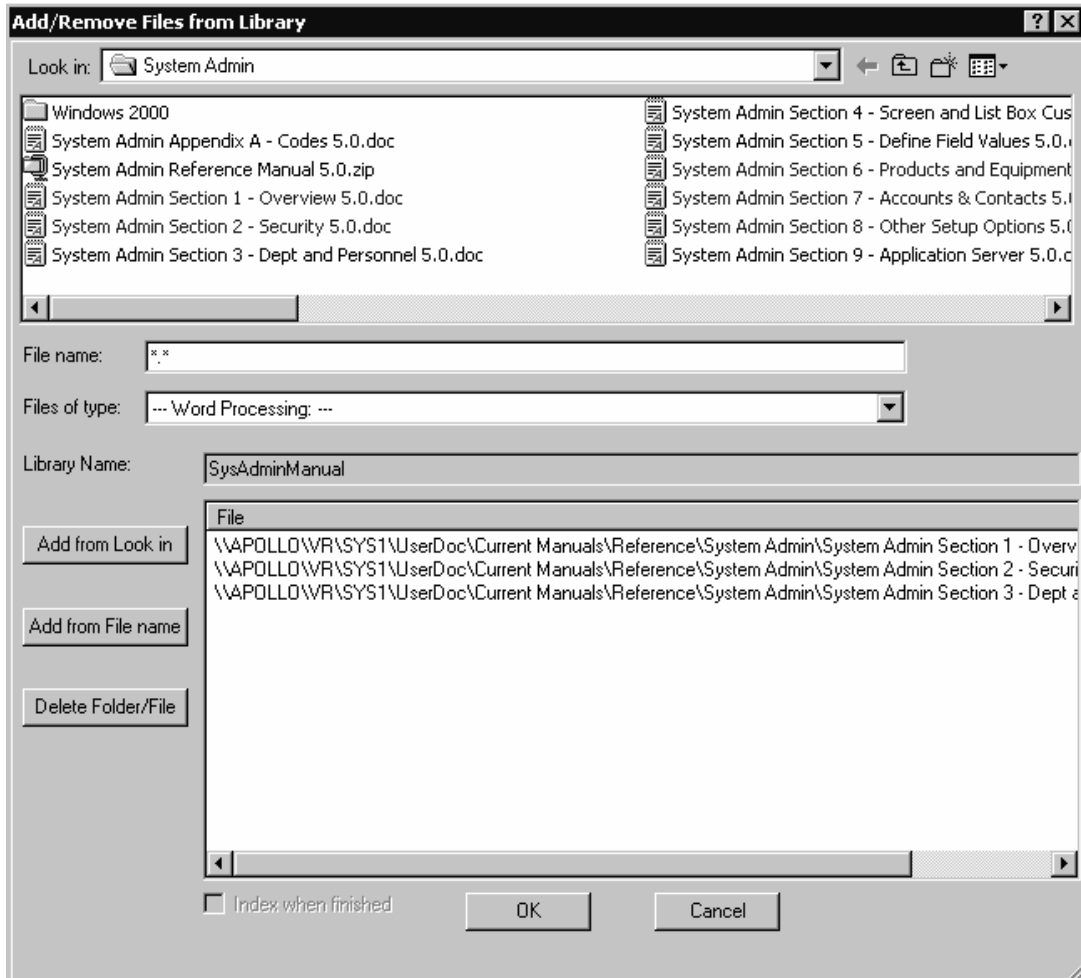
Cancel

Closes the pop-up box without saving any changes.

Add/Remove Files from Library Pop-Up Box

This pop-up box allows the user to maintain the files that are included in the external library.

Pop-Up Box Layout



Pop-Up Box Elements

Look In

Identifies where to look for the specific files for the external library. Filters the items displayed in the *Folders and Files* box. Also works in conjunction with the *Add from Look In* button.

Folders and Files

Displays the items located within the value that is selected in the *Look In* field.

File Name

Identifies specific file(s) the user wants to add to the library. Works in conjunction with the *Add from File Name* button.

Files of Type

Allows the user to select the type(s) of files to display in the *Folders and Files* box.

Library Name

The name of the external library for which the user is maintaining the files.

List Box

Displays a list of the files that have been added for the external library.

List Box Button Controls**Add From Look in**

Adds all of the folders and/or files located within the value selected in the *Look in* field to the external library. A confirmation message is displayed.

When a folder is added the specific files are not displayed until the library is indexed. After the library is indexed the folder and the related files are displayed.

Add From File name

Adds the file(s) displayed in the *File name* field to the external library.

Delete/Folder/File

Deletes the selected folder(s) and/or file(s) from the external library.

When a folder is added, the specific files cannot be individually deleted. The folder must be deleted. After the folder is deleted, the specific files will still be displayed until the library is indexed. After the library is indexed the related files will no longer be displayed.

Index when finished

If checked, when the user clicks the *OK* button, the library will be indexed. This field is disabled if *Indexing Option* for the library is 'Immediate'.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the changes.

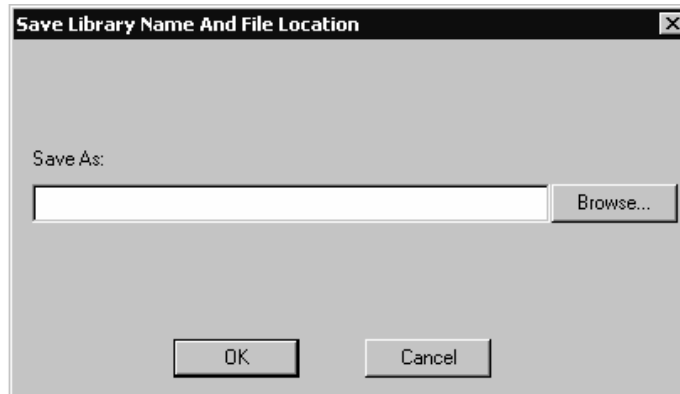
Cancel

Closes the pop-up box without saving any changes.

Save Library Name and File Location Pop-Up Box

This pop-up box allows the user to create a list of the external libraries and related files and identifies where they are located.

Pop-Up Box Layout



Pop-Up Box Elements

Save As

Identifies where the list should be saved.

Pop-up Button Controls

OK

Closes the pop-up box and saves the file(s).

Cancel

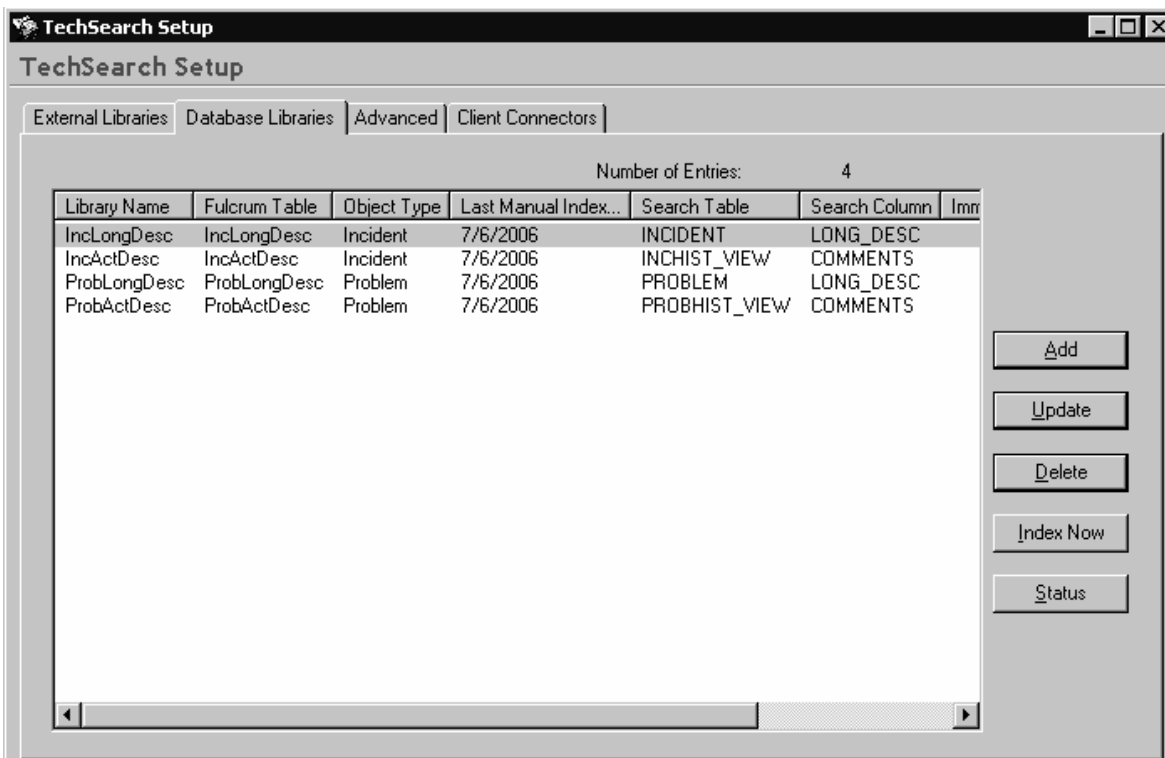
Closes the pop-up box without saving any changes.

Database Libraries Tab

Database libraries correspond to a particular database field (e.g. the long_desc field in the Incident table) in the *CustomerFirst* schema. Only one database field can be associated with a single database library. The Database Libraries tab of the *TechSearch Setup* is used to manage the various libraries.

There is an *Inchist_View* table and a *Probhist_View* table in the RTI database for use when defining your TechSearch database libraries. In order to display the object related columns in the Results for history related searches, you must search against columns in the related view. For example, if you want to define a database library for the Incident Activity *Comments*, you should use the *Comments* column in the *Inchist_View* table instead of the *Inc_History* table.

Panel Layout



Panel Elements

List Box

Displays a list of all the database libraries that have been defined.

Number of Entries

The number of database libraries in the list box.

List Button Controls**Add**

Displays the Add/Update Database-Based Library pop-up box to allow the user to enter a new database library.

Update

Displays the Add/Update Database-Based Library pop-up box to allow the user to update the *Description* of the selected database library.

Delete

Removes the selected database library.

Index Now

Displays the Index Library pop-up box to allow the user to manually index the selected library.

Status

Displays the Library Status pop-up box to allow the user to check the indexing status of the selected library.

Add/Update Database-Based Library Pop-Up Box

This pop-up box allows the user to enter the information for a database library. Once a database library is created you can only make changes to the *Description*.

There can be no duplicates in the values selected in "Column" fields.

To index and search against one of the database fields, the *TechSearch* server needs to have access to an ODBC data source capable of connecting to the database.

Pop-Up Box Layout

Pop-Up Box Elements

User

The username required to connect to the *CustomerFirst* data source. DB2 users must leave this field blank.

Password

The password required to connect to the *CustomerFirst* data source. DB2 users must leave this field blank.

Datasource

The data source for the database which you will be accessing. When you select a data source, the system will attempt to establish an ODBC connection based on this value and the *User* and *Password*. If the connection succeeds, the disabled fields in the *Library Definition* group box will become enabled.

Perform initial indexing when finished

If checked, the system will attempt to index the database fields immediately when the *OK* button is clicked.

Exclude from WebFirst

If checked, this library will not be available to *WebFirst* users for search purposes. This only applies to 'Problem' database libraries. This checkbox is only enabled if the *Search Table* field has a value of *Public_Probs*.

Library Definition group box

For each library the fields selected in the Library Definition group box must be unique. If they are not, an error will occur while trying to index the library.

Library Name

The name of the database library.

Object Type

The database object to which the library is associated. Associating an *Object Type* will allow that object to be launched directly from the search panel. Typically you should select a value in this field.

Description

A user defined description of the library.

Search Table

The name of the table that contains the field you want to search. When you make this selection, the remaining drop down fields will be populated with values available in the selected table.

Search Column

Identifies the specific field you will be searching.

Subject Column

If entered, this selection will be displayed in the search results.

Owner Column

Used to select a field from the table that corresponds to a person's name that you want displayed in the search results.

Object ID Column

Specifies the unique identifier that will be used to open the selected *Object Type* when performing a *TechSearch* query (e.g. *Incident_Id* for Incident objects). The *Object ID Column* field is only available if an *Object Type* is selected.

Date Opened Column

Used to select a field from the table that corresponds to the date opened for the related object that you want displayed in the search results.

Event Date Column

Used to select a field from the table that corresponds to the event date for a specific history record that you want displayed in the search results. For example, the Event_Date column in the Inchist_View table.

Account Column

Used to select a field from the table that corresponds to the account for the related item that you want displayed in the search results.

Contact Column

Used to select a field from the table that corresponds to the contact for the related item that you want displayed in the search results.

Product Column

Used to select a field from the table that corresponds to the product for the related object that you want displayed in the search results. For example, the Refresh_Id column in the Incident table or the Inchist_View table.

Short Desc. Column

Used to select a field from the table that corresponds to the short description for the related object that you want displayed in the search results.

Pop-up Button Controls**OK**

Closes the pop-up box and saves any changes made.

Cancel

Closes the pop-up box without saving any changes.

Examples of Database Libraries

Add/Update Database-Based Library

ODBC Connection Information

User:

Password:

Datasource:

Perform initial indexing when finished

Exclude from WebFirst

Library Definition

Library Name:

Object Type:

Description:

Search Table:

Search Column:

Subject Column:

Owner Column:

Object ID Column:

Date Opened Column:

Event Date Column:

Account Column:

Contact Column:

Product Column:

Short Desc. Column:

Add/Update Database-Based Library

ODBC Connection Information

User:

Password:

Datasource:

Perform initial indexing when finished

Exclude from WebFirst

Library Definition

Library Name:

Object Type:

Description:

Search Table:

Search Column:

Subject Column:

Owner Column:

Object ID Column:

Date Opened Column:

Event Date Column:

Account Column:

Contact Column:

Product Column:

Short Desc. Column:

Index Library Pop-Up Box

Before users can search against a library it must be indexed. *TechSearch* uses the indexing process to identify and catalog all the possible search terms contained in a library's documents. This pop-up box allows a user to manually index a library. An indexing process can also be scheduled for a library. Refer to the Scheduling Manual Library Indexing topic in this section for additional information.

A Database Library is never automatically indexed. It must be done manually from this panel or through a scheduler. If an External Library is setup with 'Immediate' indexing it should still be manually indexed from time to time to improve performance.

A library must be indexed on the *TechSearch* Server machine. This can be remote access to the machine.

Access

This pop-up box can be accessed from the External Libraries tab and the Database Libraries tab of the TeshSearch Setup panel.

Pop-Up Box Layout

Index Library

Warning: Indexing can take a long time and may consume significant database resources.

Library Name: Sys_Admin

Type of Indexing to Perform

- Validate contents of files or database records in addition to updating the library's index.
- Reindex the entire library and its contents.
- Reindex the library only.

Sort Buffer Size: Kb

Temporary File Size: Kb

OK Cancel

Pop-Up Box Elements

Library Name

The name of the library to be indexed. This is a read only field.

Type of Indexing to Perform

Validate contents of files or database records in addition to updating the library's index.

This option will only index those items that have been removed from the library, added to the library, or changed since the last time indexing was performed. This is the choice that you will likely use the most.

Reindex the entire library and its contents

This option will rebuild the internal structures for a library. This option is required if you modify the *TechSearch* stop file (Fultext.stp). In addition, it can be used if the *TechSearch* internal tables corresponding to a library have become corrupt. This operation can take a long time depending on the number of items contained in the library.

Reindex the library only

Can be used to re-index only the internal structures. External documents are ignored under this option. This option is not normally used in regular operation.

Sort Buffer Size

The size of the sort buffer to be used. If this field is left blank, the system will use an internal default setting.

Temporary File Size

The size of the temporary file to be used. If this field is left blank, the system will use an internal default setting.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Library Status Pop-Up Box

This pop-up box allows the user to verify that a library was successfully indexed. Items that are not indexed for the library can be displayed.

Access

This pop-up box can be accessed from the External Libraries tab and the Database Libraries tab of the TeshSearch Setup panel.

Pop-Up Box Layout

The screenshot shows a dialog box titled "Library Status". At the top, there is a text field for "Library Name" containing "SysAdminManual" and a "Number of Entries" field showing "0". To the right are two radio buttons: "Display only non-indexed rows" (which is selected) and "Display all rows". Below this is a large empty list box with a "File" header and scroll bars. At the bottom of the dialog, there is a section for "Indexing Log File" with a "Log File Name" field containing "C:\Program Files\RTI\TechSearch Server\fultext\SysAd". To the right of this field are "Browse", "Clear", and "Reload" buttons. An "OK" button is centered at the bottom of the dialog.

Pop-Up Box Elements

Library Name

The name of the library for which you are checking the indexing status.

Display only non-indexed rows

If selected, only the rows or files in the selected library that were not indexed successfully are displayed.

Display all rows

If selected, all rows or files in the selected library are displayed.

List Box

Displays all rows or files in the selected library or just the files that did not get indexed.

Number of Entries

The total number of items displayed in the list box.

Log File Name

Displays the name of the log file associated with the selected library. A library's log file shares the same name as the library and has a .LOG extension. By default, it is placed in the /fultext directory along with the other *TechSearch* server data files.

The file and path defaulted into the *Log File Name* field is relative to the server machine. Therefore, if you attempt to use the Library Status on a non-server machine, you will have to locate the file yourself.

The text in the log file should provide enough information for you to determine why some of the items in a library could not be indexed. Typically this is due to an unsupported document type, insufficient access privileges to a document, or a broken network connection during the indexing process. If there are errors that do not appear to be correctable, save a copy of the log file and contact the RTI Technical Support area.

Browse button

Allows the user to search for a different log file.

Clear button

Clears the contents of the log file identified in the *Log File Name* field.

Reload button

Reloads the file indicated in the *Log File Name* field.

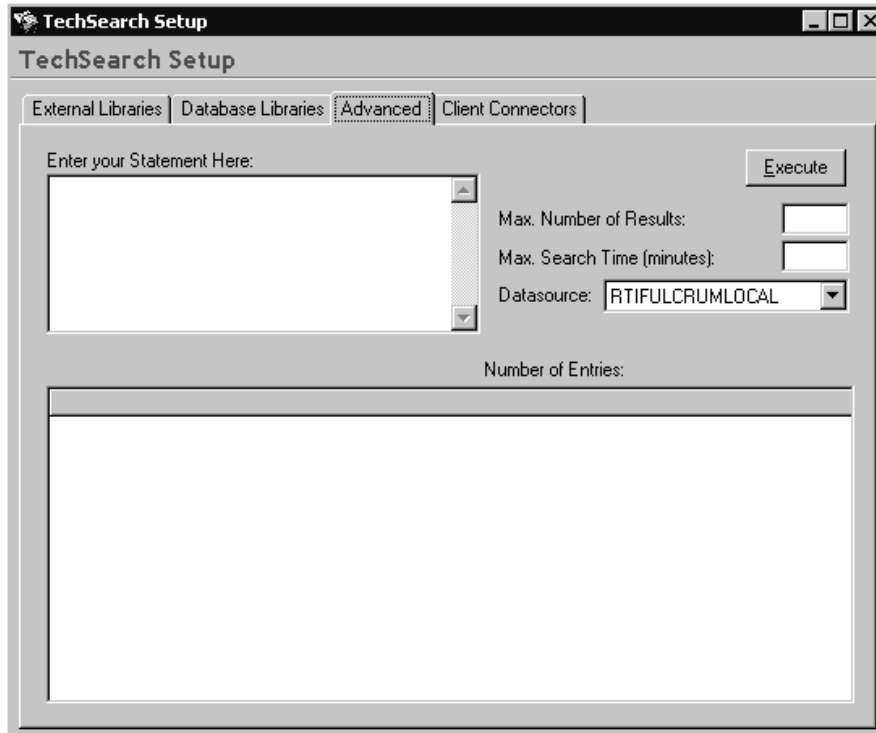
Pop-up Button Controls**OK**

Closes the pop-up box.

Advanced Tab

The Advanced tab contains an edit box and a list box. The *TechSearch* server understands a variant of SQL called SearchSQL. A user can enter a SearchSQL statement in the edit box, execute it, and then view the results in the list box. This tab provides RTI Technical Support with a way of troubleshooting the *TechSearch* server from within our own application. In general, a user should not use this tab page unless specifically instructed by one of the RTI Technical Support representatives.

Panel Layout



Panel Elements

Enter your Statement Here

The SearchSQL statement that will be run against the *TechSearch* Server.

Max. Number of Results

The maximum number of results that should be returned as part of the search.

Max. Search Time (minutes)

The maximum amount of time (in minutes) that TechSearch Server should search for results.

Datasource

The datasource against which you wish to search.

List Box

Displays a list of the results returned as part of the search.

Number of Entries

The total number of entries displayed in the list box.

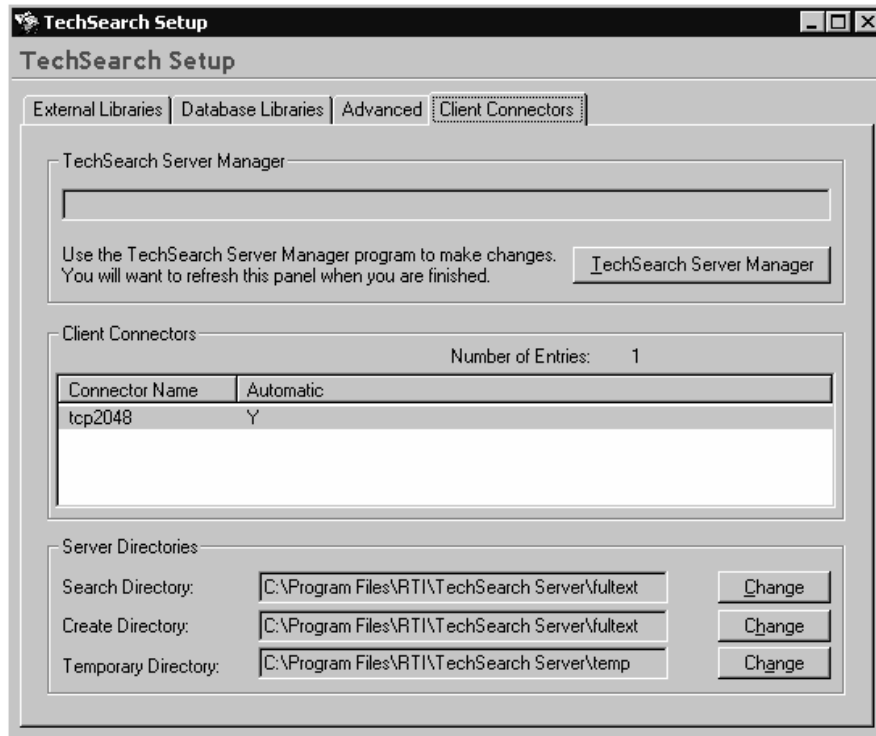
Panel Button Controls**Execute**

Executes the SearchSQL statement entered in the *Enter your Statement Here* field.

Client Connectors Tab

This tab provides access to manage the *TechSearch* service and client connectors.

Panel Layout



Panel Elements

TechSearch Server Manager

Displays the status of the service.

TechSearch Server Manager button

Displays the Hummingbird Connector Manager panel that allows you to define the client connectors.

Client Connectors List Box

Displays the client connectors that have been defined.

Number of Entries

The total number of client connectors that have been defined.

Search Directory

Specifies the location of a required configuration and message file, fultext.ftc. By default, this value should be set to the /fultext directory created during installation.

Change button)

Allows the user to change the location of the search directory.

Create Directory

Contains the *TechSearch* tables that can be accessed by a user. By default, this value should be set to the /fultext directory created during installation.

Change button

Allows the user to change the location of the create directory.

Temporary Directory

The working directory that *TechSearch* will use for temporary storage space when performing searches. This should be set to a temp directory on the machine where TechSearch is running.

Change button

Allows the user to change the location of the temporary directory.

Hummingbird Connector Manager Panel

This panel displays the service that is running the Fulcrum Server and the status of the service.

Pop-Up Box Layout



Panel Elements

List

Displays a list of the defined services.

List Box Button Controls

Setup

Displays the Hummingbird Connector Service Setup pop-up box to allow the user to setup the selected service.

Startup

Displays the Service Startup Type pop-up box to allow the user to select the specific type of startup for the selected service.

Remove

Removes the selected service from the panel.

Start

Starts the selected service.

Stop

Stops the selected service.

Panel Button Controls

Close

Closes the Hummingbird Connector Manager panel.

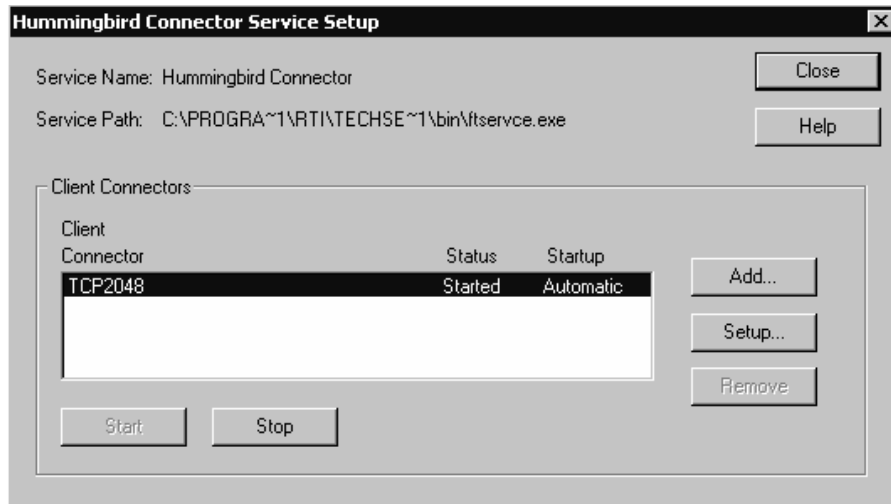
Help

Displays the Hummingbird Connector Manager Help panel.

Hummingbird Connector Service Setup Pop-Up Box

This pop-up box displays a list of the defined client connectors.

Pop-Up Box Layout



Pop-Up Box Elements

Service Name

The name of the service to which the selected connector is associated.

Service Path

The path where the service is found.

List

Displays a list of the defined client connectors.

List Box Button Controls

Start

Starts the selected client connector.

Stop

Stops the selected client connector.

Add

Displays the Add Client Connector pop-up box to allow the user to add a new client connector.

Setup

Displays the Setup Client Connectors pop-up box to allow the user to update the selected client connector.

Remove

Removes the selected client connector from the list.

Pop-up Button Controls

Close

Closes the Fulcrum Server Service Setup pop-up box.

Help

Displays the Hummingbird Connector Manager Help panel.

Add Client Connector Pop-Up Box

This pop-up box allows the user to add a new client connector. Client connectors provide a connection between a client machine's *TechSearch* session and the location of the *TechSearch* Server tables across a specified network protocol. During installation, you will need to define at least one client connector.

Pop-Up Box Layout

Pop-Up Box Elements

Client Connector

This entry defines the network settings used by this client connector. *TechSearch* supports the following network protocols – TCP/IP, IPX/SPX and Named Pipes. The value entered into this field depends on the network protocol you choose to implement. You may have to contact your system administrator for the correct values for these additional network settings. The TCP/IP client connector is likely to be the simplest type to configure, and we recommend that our customers use this protocol in their *TechSearch* environment.

If you choose to use TCP/IP, the client connector should be entered using the following format: tcp[port_number] where [port_number] is the port used to listen for *TechSearch* requests. The default port number for TCP/IP is 2048.

If you will be using IPX/SPX use this format: spx[socket_number/node_number/network_number].

For the Named Pipes protocol use the following: nmp[-pipename].

Fulcreate

Contains the *TechSearch* tables that can be accessed by a user. By default, this value should be set to the */fultext* directory created during installation. The value in this field should be the same as the value in the *Fulsearch* field.

Fulsearch

The *Fulsearch* directory specifies the location of a required configuration and message file, *fultext.ftc*. The *Fulsearch* directory contains the *TechSearch* tables that can be accessed by a user. By default, the value should be set to the */fultext* directory created during installation. The value in this field should be the same as the value in the *Fulcreate* field.

Fultemp

The working directory that *TechSearch* will use for temporary storage space when performing searches.

Startup Type

Use this to define whether this client connector will be started manually, or will start automatically whenever the parent service is started. For simplicity, we recommend that all client connectors have the *Automatic* startup type.

Automatic

If selected, the connector will start automatically.

Manual

If selected, the connector must be started manually.

Connection Security Type

This determines the security mechanism used by ODBC to validate a connection. We recommend that you select *Ignored (Default is also ignored)*. DB2 users must select this option. If you would like to implement network logins to control access one of the other values can be selected.

Default Username and Password

Will only be enabled if *Used if provided (Otherwise, the Default is used)* option is selected. Enter a valid Windows NT login and password. Also select the domain for that login in the *From* field. This Windows NT user account must have the user rights for *Logon as a batch job* and *Logon as a service*. For DB2 users these fields will be disabled.

IMPORTANT NOTE: If entered, this login must be used when creating or maintaining External Libraries.

Pop-up Button Controls**OK**

Saves the information and closes the pop-up box.

Cancel

Closes the pop-up box without saving any information.

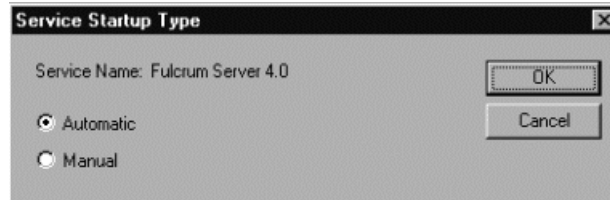
Help

Displays the Hummingbird Connector Manager Help panel.

Service Startup Type Pop-Up Box

This pop-up box allows the user to select the type of startup for the selected service. The type can be either *Manual* (i.e. a user must explicitly use this program to start and stop the service) or *Automatic* (i.e. the service is started automatically during the boot-up process without any user interaction). It is recommended that you make this service startup automatically so that TechSearch is always available as long as the server machine is running.

Pop-Up Box Layout



Pop-Up Box Elements

Automatic

If selected, the service will start automatically during the boot-up process.

Manual

If selected, the service must be started manually.

Pop-up Button Controls

OK

Saves the information and closes the pop-up box.

Cancel

Closes the pop-up box without saving any information.

Scheduling Manual Library Indexing

The *CustomerFirst TechSearch* libraries that you create need to be indexed periodically to maximize completeness and efficiency when using *TechSearch*. While it is possible to index libraries from within the *CustomerFirst* System Administrator program using the *TechSearch* Setup panel, using this method requires that a user be present to initiate and complete the indexing. This restriction is often impractical when trying to index the *TechSearch* libraries during off-hours. The *TechSearch* Indexing Utility (RTIFTIDX.EXE) provides a command line interface that you can use in conjunction with a scheduling program to automate the indexing process.

The *Validate contents of files or database records in addition to updating the library's index* indexing option is used unless the *Reindex the entire library and its contents* option is specifically selected in the command line.

The *TechSearch* Indexing Utility should be run (whether manually or through a scheduler) on the *TechSearch* Server Machine.

Note: Only one copy of the *TechSearch* Indexing Utility can be running at any given time.

The following table summarizes the command line options available for the *TechSearch* Indexing Utility:

Option	Description
-L<library name>	Index <library name> only
-F<file name>	Index only the libraries listed in the file <file name>
-ALL	Index ALL libraries
-ABANDON	Index using the <i>Reindex the entire library and its contents</i> option
-U<user name>	User name for the <i>CustomerFirst</i> user
-P<password>	Password used by <user name> in <i>CustomerFirst</i>
-D<database>	Database used by <i>CustomerFirst</i>
-S<server>	Database server used by <i>CustomerFirst</i>
-HIDE	Hide the diagnostic display window
-TEST	Test the command-line options without actually performing an index
-O<output log file>	Output the messages to log file name <output log file>

- You must choose exactly one of the following indexing target options.

-L<library name>

You can use this option to define the single *TechSearch* library you want to have indexed. The library you identify, <library name>, must have been created using the *TechSearch* Setup panel. You can specify both external libraries and database libraries.

-F<file name>

You can use this option to define multiple *TechSearch* libraries that you wish to have indexed. <file name> must be a text file that lists each library to be indexed on its own line. These libraries must have been created using the *TechSearch* Setup panel. You can specify both external libraries and database libraries in file.

-All

Use this option to index all of the *TechSearch* libraries defined in *CustomerFirst*.

- You can use the following option to change the type of indexing that is performed.

-ABANDON

Use this option to indicate that the *Reindex the entire library and its contents* indexing option should be used. This type of indexing is required if any changes were made to the *TechSearch* stop file (Fultext.stp).

- To successfully index the specified *TechSearch* libraries, the *TechSearch* Indexing Utility will need to connect to the *CustomerFirst* database as a *CustomerFirst* user. Use the following options to specify the *CustomerFirst* connection to use. For simplicity, you can use the same connection settings that you use when logging into the Escalation Server or Inmail Server programs. If you omit any of these options, the *TechSearch* Indexing Utility will prompt you for *CustomerFirst* login information before indexing any tables.

-U<user name>

Set <user name> to be a *CustomerFirst* user that has basic update (write) access privileges to the *CustomerFirst* database.

-P<password>

Set <password> to be the password used by <user name> to log into *CustomerFirst*.

-D<database>

Use <database> to identify the *CustomerFirst* database that you will be using.

-S<server>

Use <server> to specify the database server used to house <database>.

- Use the following options for diagnostic and/or logging purposes.

-HIDE

By default, the *TechSearch* Indexing Utility opens a diagnostic window that is used to display progress and/or error messages. You can use this option to hide this window while the *TechSearch* Indexing Utility is running. If this option is chosen, the program will exit when it has finished. Otherwise, you will have to close the diagnostic window yourself before the program can exit.

-TEST

Use this option to validate the rest of your command-line option without actually indexing any *TechSearch* libraries. This option is useful when initially defining the command-line options you wish to use. In TEST mode, the *TechSearch* Indexing Utility will attempt to make a *CustomerFirst* database connection according to the defined connection options, validate the existence of each identified library, perform a "fake" index on each library, and then close the database and *TechSearch* connections used by the indexing utility. If you specify the TEST option, the VISIBLE option will be set as well.

-O<output log file>

You can direct logging information to a file name <output log file>. If this file does not exist, it will be created. If it already exists, it will be overwritten. The messages written to <output log file> are the same messages displayed in the diagnostic window when the VISIBLE option is used.

Examples

```
rtiftidx -Uran -Pxxx -SOracle8 -Drtitrain -LIncDesc -Oc:\temp\index.log
```

Log into *CustomerFirst* as user ran and index only the IncDesc *TechSearch* library. Create a log file named c:\temp\index.log

```
rtiftidx -Uran -Pxxx -SOracle8 -Drtitrain -ALL -TEST
```

Log into *CustomerFirst* as user ran. Use TEST mode to validate that all defined *TechSearch* libraries can be indexed.

Section 11

Incident Characteristics

Section 11

Incident Characteristics

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Incident Characteristics Report (R0018) 21

Overview

Incident characteristics are attributes of an incident that identify relevant information about the incident. A characteristic can be associated with a possible resolution, diagnostic, or procedure. Characteristics can be used to find similar issues, for general searching, or for reporting purposes. Incident characteristics can be used for searching purposes from the following places:

- Resolution Search tab from the Incident panel
- Incident Search panel
- Problem Search Panel
- Knowledge Base Search in *WebFirst*

A *Characteristic Type* provides a group or category for related Characteristic Values. Characteristic types must be predefined. Some examples are listed below.

- Functions
- Panels
- Fields
- Error Codes
- Keywords

A *Characteristic Value* is a word, phrase, name, or number that will provide specific information about an incident. Characteristic values may be predefined for selection, or user defined for a specific incident. Predefined characteristic values can be imported using the Characteristic Value Import. Refer to the Data Imports section of this manual for additional information. Some examples of characteristic values are listed below.

- Maintain Characteristic Types and Values(Function)
- Characteristic Type panel (Panel)
- Characteristic Value Set-up panel (Panel)
- Type Name (Field)
- Value Name (Field)
- CFS260 (Error Code)
- Characteristic (Keyword)

Synonyms can be defined for predefined characteristic values.

Characteristic values can be associated with an incident in the following ways:

- The system will automatically search the incident *Long Description* for matches to predefined values if appropriate for the specific characteristic type.
- A user can select a predefined *Characteristic Value* for a *Characteristic Type* that appears on the Main tab of the Incident panel. Four types can be displayed on the Incident panel. This is defined on the User Group Preferences panel. Refer to the Other Setup Options section of this manual.
- A user can select predefined characteristic values on the Resolution Search tab of the Incident panel.

- A user can enter user defined characteristic values on the Resolution Search tab of the Incident panel for specified characteristic types.

Generate Incident Characteristics should be run after you add new predefined characteristic values for characteristic types that are set to *Use for search of Long Description*. When this is run, the system reads the incident *Long Description* for all existing incidents and updates their characteristics to reflect matches with new predefined values that have been added to the table.

The Incident Characteristics Report (R0018) should be run on a regular basis to identify which characteristic values are being used:

Characteristic Type Set-Up Panel

This panel is used to define characteristic types. A characteristic type provides a group or category for related characteristic values. Characteristic types must be predefined. An unlimited number of characteristic types can be defined.

Document and discuss the characteristic types before you add them in the system.

Access

This panel is accessed by selecting *Administration* and *Characteristics* and *Define Types and Values* from the menu bar.

Menu Bar Choices

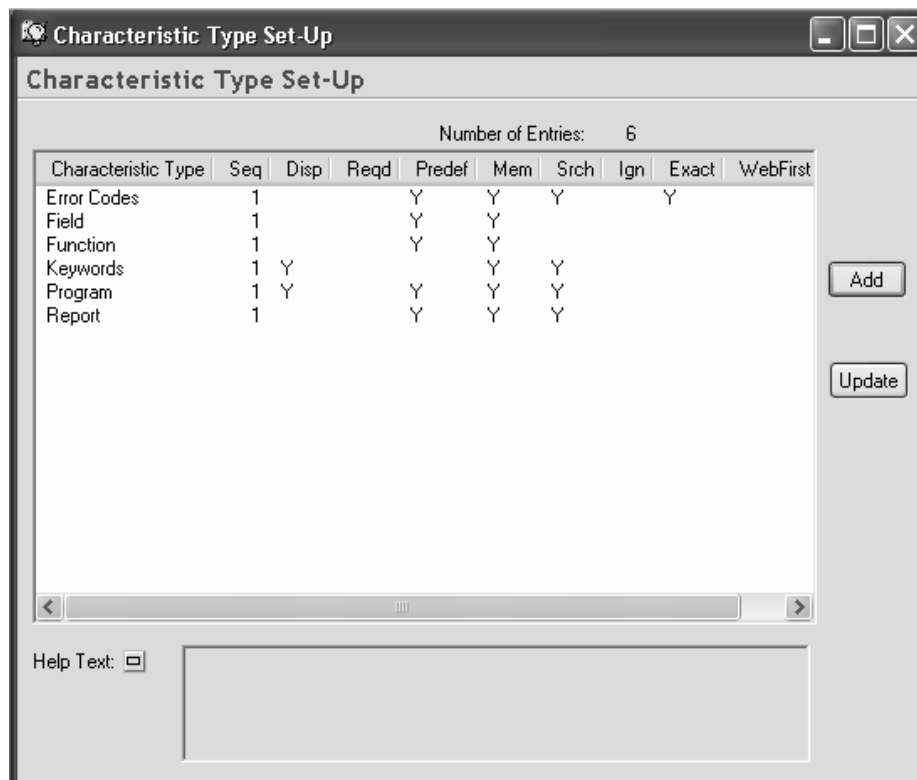
Char. Type Setup

Edit Values

Edit Values

Displays the Characteristic Value Set-Up panel showing the defined values for the highlighted characteristic type.

Panel Layout



Panel Elements

List Box

Displays a list of the characteristic types defined in the system.

Number of Entries

The number of characteristic types defined in the system.

Related Information

Help Text (Character_Type.Help_Text)

This is the help text for the selected characteristic type in the list.

List Box Button Controls

Add

Displays the Characteristic Type pop-up box for entry of a new characteristic type.

Update

Displays the Characteristic Type pop-up box for updating the type information for the highlighted type. This option can also be invoked by double-clicking on a row in the list box.

Characteristic Type Pop-Up Box

This box is used to add or update characteristic types.

Pop-Up Box Layout

Pop-Up Box Elements

Type Name (Character_Type.Type_Name)

The name of this characteristic type.

Sort Sequence (Character_Type.Sort_Sequence)

The sort sequence to be used when displaying the types in the list box on the Resolution Search tab of the Incident panel. The types are displayed in alphabetical order within sort sequence. Therefore, if the same sort sequence is given to all types, the types will appear in alphabetical order.

Always display even if no value (Character_Type.Always_Display)

Indicates that this type will be displayed on the Resolution Search tab of the Incident panel, even if no values are defined which apply to the product or product family.

Required when displayed (Character_Type.Reqd_When_Display)

Indicates that a value for this Characteristic Type must be defined if you have chosen to display this type on the Main tab of the Incident panel via User Group Preferences.

Values must be pre-defined (Character_Type.Predetermine_Entries)

Indicates that the values must be predefined for this characteristic type. Users will not be able to add user-defined characteristic values for this type on the Resolution Search tab of the Incident panel.

Cache in memory (Character_Type.Cache_Memory)

Indicates that the values for this characteristic type will be cached in memory. Only values whose type is cached in memory will be displayed automatically in the list box on the Resolution Search tab of the Incident panel. If values are not cached, when the user tries to expand the folder a pop-up will be displayed that will be used to filter the values displayed.

Use for search of long description (Character_Type.Desc_Search)

Indicates that the incident *Long Description* will be searched for any text that matches values defined for this characteristic type. If any are found, they will automatically be added as characteristics for the incident.

Default to ignore for search (Character_Type.Def_Ignore)

Indicates that this characteristic type will not be used when searching for similar incidents. On the Resolution Search tab of the Incident panel, if a characteristic of this type is added, it will be flagged as ignored when searching for Related Problems. This can be overridden on the Resolution Search panel for the specific incident. This allows the user to capture miscellaneous information about the incident that will not be used during search.

Exact match from long description (Character_Type.Exact_Match)

Indicates that there must be an exact match when comparing characteristic values with the incident *Long Description*. For example, a characteristic will not be added if a value is "light" and the *Long Description* contains the word "highlighted". It will add "light" as a characteristic if the *Long Description* contains the word "lights" since plurals are ignored.

Exclude from *WebFirst* (Character_Type.WebFirst_Exclude)

If this field is checked, this characteristic type will not be available in *WebFirst*.

Help Text (Character_Type.Help_Text)

The help text associated with this characteristic type.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Cancel

Closes the pop-up box without saving the current changes.

Characteristic Value Set-Up Panel

This panel displays the values for the highlighted characteristic type on the Characteristic Type Set-Up panel. From this panel you can add, update, and delete values for the characteristic type.

Characteristic values should be unique. Make sure that text in the incident *Long Description* will not be incorrectly matched with a predefined characteristic value. In addition, typically the same value should not be defined for more than one characteristic type.

Document and discuss the predefined characteristic values before you add them in the system.

Access

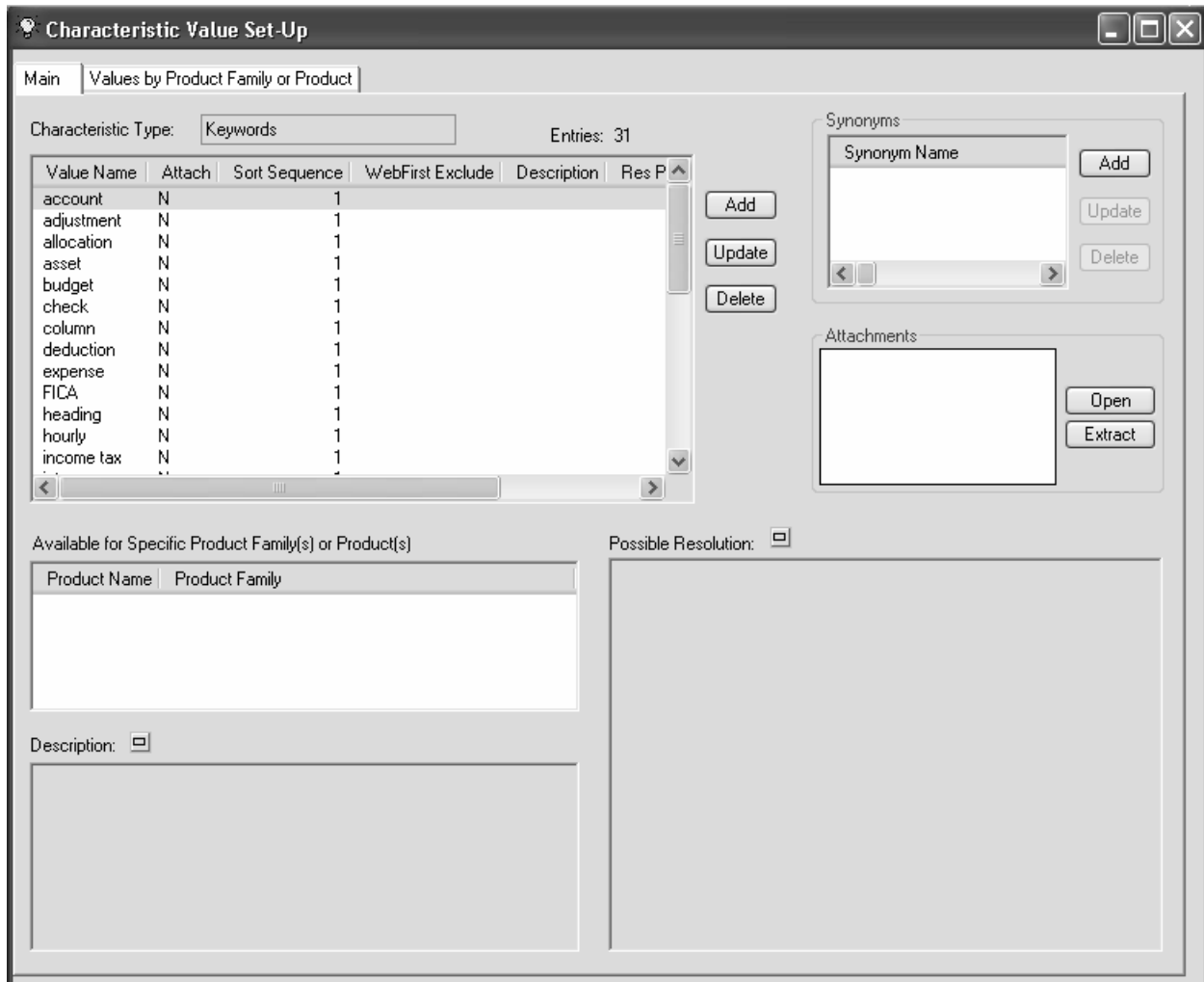
This panel is accessed from the Characteristic Type Set-Up panel. You can double click on a specific Characteristic Type in the list box, or select *Char. Type Setup* and *Edit Values* from the menu bar.

Main Tab

All of the characteristic values associated with the specific characteristic type are displayed on this tab. Information related to each value is displayed.

A characteristic value can be deleted from this tab.

Panel Layout



Panel Elements

Characteristic Type (Character_Value.Type_Id)

The name of the characteristic type with which this value is associated.

List of Characteristic Values

Displays a list of characteristic values for the type displayed in the *Characteristic Type* field.

Entries

The number of characteristic values displayed in the list.

Related Information**Available for Specific Product Family(s) or Product(s)**

Displays the product families or products that the selected value is associated with.

Description (Character_Value.Description)

The description of characteristic value selected in the list box.

List Box Button Controls**Add**

Displays the Define Characteristic Value pop-up box for entry of a new characteristic value.

Update

Displays the Define Characteristic Value pop-up box for the selected value for the user to update the value. This button is disabled if there are no entries in the characteristic value list box.

Delete

Deletes the highlighted value in the list box from the predefined characteristics (Character_Value table). and the incidents that have the characteristic value (Incident_Char table. This button is disabled if there are no entries in the characteristic value list box.

Due to the potential number of updates to the database, this should be done off hours.

Synonyms (Char_Val_Synonym.Synonym_Name)

Identifies the synonyms associated with the highlighted value.

Add button

Displays the Add Synonym pop-up box for entry of a new synonym for the highlighted characteristic value.

Update button

Displays the Add Synonym pop-up box for the selected characteristic value for the user to update the synonym. This button is disabled if there are no entries in the characteristic value list box.

Delete button

Deletes the selected synonym. This button is disabled if there are no entries in the Synonym list box.

Attachments

Displays a list of the attachments that are associated with the selected characteristic value. From here you can *Open* or *Extract* an existing attachment For additional information about attachments refer to the General User Interface section of the *CustomerFirst* Reference manual.

Possible Resolution (Character_Value.Poss_Res)

A description of a possible resolution or steps to resolve the issue related to this characteristic value.

Values by Product Family or Product Tab

This tab allows the user to view the characteristic values by *Product Family* or *Product*.

Panel Layout

Characteristic Value Set-Up

Main Values by Product Family or Product

Prod. Family: Characteristic Type: Keywords

Product: Payroll Manager

Characteristic Values Entries: 5

Value Name	Attach	Sort Sequence	WebFirst Exclude	Description	Res Prob
deduction	N	1			
FICA	N	1			
hourly	N	1			
salary	N	1			
wage	N	1			

Synonyms

Synonym Name Add Update Delete

Attachments

Open Extract

Description: Possible Resolution:

Panel Elements

Product Family

Allows the user to display the values that are associated with a specific *Product Family*.

If a value is selected in this field the *Product* field is filtered based on this field. If a value is selected in this field and the *Product* field is blank, the Characteristic Values List is populated based on the *Product Family* selected. If a value is selected in this field and the *Product* field is populated, the Characteristic Values List is populated based on the *Product* selected.

Product

Allows the user to display the values that are associated with a specific *Product*. If a value is selected in this field, the Characteristic Values List is populated based on the *Product* selected.

Other Fields

For information about the other fields on this tab refer to the Main tab.

Define Characteristic Value Pop-Up Box

This box is used to add or update characteristic values.

Characteristic values can be filtered in the characteristic value trees or dropdown lists by one or more product families, or one or more products. If no product families or products are selected, the value will be available for all products.

Pop-Up Box Layout

Pop-Up Box Elements

Characteristic Type (Character_Value.Type_Id)
The name of the characteristic type with which this value is associated.

Value Name (Character_Value.Value_Name)
The value name.

Sort Sequence (Character_Value.Sort_Sequence)

Indicates in what order the value should appear in characteristic value trees and drop down lists. If the sequence number is the same for multiple values, the values will be sorted alphabetically within that sequence.

Exclude from WebFirst (Character_Value.Webfirst_Exclude)

If this field is checked the characteristic value will not be available in *WebFirst*.

Available for Specific Product Family(s) (Char_Value_Prod.Product_Family_Id)

Displays a list of the product families that the characteristic value is associated with. If a value is associated with one or more product families, it cannot be associated with a product.

Add Family button

Displays the Select Product Families pop-up box to associate the characteristic value with one or more product families.

Delete Family button

Deletes the selected product family from the list. This button is disabled if there are no entries in the list box.

Available for Specific Product(s) (Char_Value_Prod.Product_Id)

Displays a list of the products that the characteristic value is associated with. If a value is associated with one or more products, it cannot be associated with a product family.

Add Product button

Displays the Select Product(s) pop-up box to associate the characteristic value with one or more products.

Delete Product button

Deletes the selected product from the list. This button is disabled if there are no entries in the list box.

Description (Character_Value.Description)

The description of this characteristic value. This description is accessible from the Resolution Search tab of the Incident panel.

Attachments

The Attachment Source box lets you add electronic documents that contain additional information regarding the characteristic value. The attachments are accessible from the Resolution Search of the Incident panel.

Possible Resolution (Character_Value.Poss_Res)

This allows you to provide diagnostic information or an actual resolution related to the specific value. This is useful for values such as error codes. This information is accessible from the Resolution Search tab of the Incident panel.

Possible Resolution Problem ID (Character_Value.Poss_Res_Prob_Id)

The *Problem Id* for an actual problem in the database that may contain the solution when this characteristic value applies to the incident. If common questions or problems are pre-defined in the system and this *Problem Id* is entered here, it allows *CustomerFirst* to link a new incident to an existing problem so the new incident can be immediately resolved.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Add & Clear

Only available if the user is adding a characteristic value. Adds the characteristic value and clears the fields for the entry of another value.

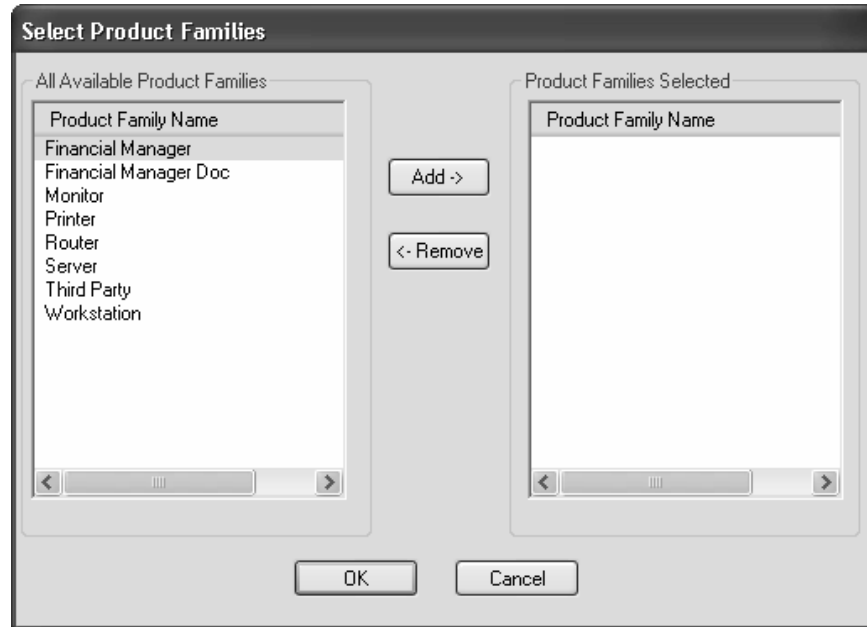
Cancel

Closes the pop-up box without saving the current changes.

Select Product Families Pop-up Box

This pop-up box allows the user to select one or more product families to associate with the characteristic value.

Pop-up Box Layout



Pop-up Box Elements

All Available Product Families

Displays a list of the product families that can be selected.

Product Families Selected

Displays a list of the product families that are selected.

List Box Button Controls

Add

Adds the selected product families in the *All Available Product Families* list to the *Product Families Selected* list.

Remove

Removes the selected product families from the *Product Families Selected* list.

Pop-up Button Controls

OK

Saves the current changes and closes the pop-up box.

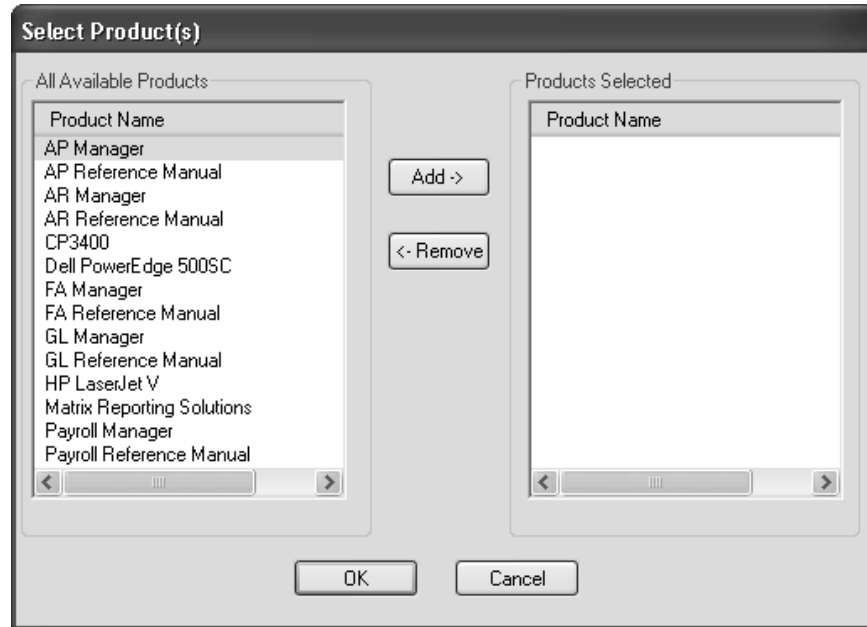
Cancel

Closes the pop-up box without saving the current changes.

Select Product(s) Pop-up Box

This pop-up box allows the user to select one or more products to associate with the characteristic value.

Pop-up Box Layout



Pop-up Box Elements

All Available Products

Displays a list of the products that can be selected.

Products Selected

Displays a list of the products that are selected.

List Box Button Controls

Add

Adds the selected product(s) in the *All Available Products* list to the *Products Selected* list.

Remove

Removes the selected product(s) from the *Products Selected* list.

Pop-up Button Controls

OK

Saves the current changes and closes the pop-up box.

Cancel

Closes the pop-up box without saving the current changes.

Modify Characteristics Panel

This panel is used to move a user defined or predefined characteristic value from one characteristic type to another predefined characteristic type and characteristic value.

If the characteristic value has already been associated with one or more incidents, the *Characteristic Type* and *Characteristic Value* will be changed for each incident. If the original value was predefined it is deleted from the predefined table.

The characteristic type of 'Program' does not appear since the values for that type are defined using the Product Program facility.

Access

This panel is accessed by selecting *Administration* and *Characteristics* and *Move/Merge Values* from the menu bar.

Menu Bar Choices

Modify Chars.

Add Characteristic Type
Add Characteristic Value

Add Characteristic Type

Displays the Characteristic Type pop-up box to add a new characteristic type.

Add Characteristic Value

Displays the Define Characteristic Value pop-up box to add a new characteristic value associated with the highlighted characteristic type.

Panel Layout

The screenshot shows a window titled "Modify Characteristics". It contains two main sections: "Source" and "Target".

Source Section:

- From Type:** A list box containing "Error Codes", "Field", "Function", "Keywords", and "Report".
- From Value:** A list box containing "1099 Processing", "Account Structure", "AP Journal Processing", "Check Reconciliation", "Invoice Adjustments", "Invoice Payments", "Invoicing", and "Journal Adjustments".

Target Section:

- To Type:** A list box containing "Error Codes", "Field", "Function", "Keywords", and "Report".
- To Value:** A list box containing "account", "adjustment", "allocation", "asset", "budget", "check", "column", and "deduction".
- Update:** A button located to the right of the "To Value" list box.

Panel Elements

From Type (Character_Value.Type_Id)
The name of the characteristic type whose value is to be modified.

From Value (Character_Value.Value_Name)
The characteristic value to be modified.

To Type (Character_Value.Type_Id)
The characteristic type to which the *From Value* is being moved.

To Value (Character_Value.Value_Name)
The characteristic value to which the *From Value* is being moved.

Panel Button Controls

Update
Completes the processing to modify the characteristics.

Generate Incident Characteristics Panel

This panel is used to generate incident characteristics for existing incidents. When this function is run, the system reads the incident *Long Description* for all existing incidents and updates their characteristics to reflect matches with new predefined values that have been added to the table. This is useful to help ensure that incidents have the appropriate characteristic values for searching and reporting purposes.

The Generate Incident Characteristics should be run after you add new predefined characteristic values for characteristic types that are set to *Use for search of Long Description*.

This function should not be run during normal working hours.

Access

This panel is accessed by selecting *Administration* and *Characteristics* and *Generate Values for Incidents* from the menu bar.

Menu Bar Choices

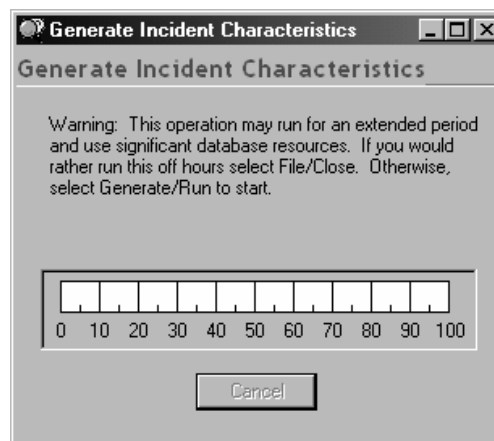
Generate

Run

Run

Starts the generation of incident characteristics.

Panel Layout



Panel Elements**Percent Bar**

The percent bar is used to indicate the percentage of incidents that have been scanned for processing.

Panel Button Controls**Cancel**

The cancel button is enabled after processing has begun. This can be used to stop the generation of new incident characteristics.

Incident Characteristics Report (R0018)

The Incident Characteristics Report should be run on a regular basis to identify the following:

- Identify if incident characteristics are being associated with incidents.
- Identify which characteristic values are being used. You may need to modify your values.
- If you allow users to add user defined characteristics to incidents, identify what values have been used.
 - Are the user defined values appropriate?
 - Should any of the user defined values be added to the predefined table?

The report first displays each predefined value and how many times it has been used. The values are grouped by characteristic type. The report then displays each user defined value that was added and how many times it has been used.

Refer to the Queries and Reports manual for additional information.

Access

This report is accessed by selecting *Tools* and *Reports* from the menu bar.

Section 10

Escalation

Section 10

Escalation

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Overview

The Escalation feature provides an additional facility to help you manage your workflow and notify individual users or departments of situations that should be addressed. You can also send an e-mail message to the contact on an incident, or other contacts for the Account on the incident.

Escalation rules are defined using the Define Escalation Rule panel, and those rules are then evaluated and executed by the Escalation Server. You can identify how often the system should examine changes that have been made to the database. The Escalation Server will determine if specific rules apply, if appropriate it will schedule an action to be taken, and at the appropriate time it will execute the action if it still applies.

You can define escalation rules for the following:

- Incidents
- Incident Activities
- Problems
- Permanent Fixes
- Permanent Fix Versions/Implementations
- Tasks
- Sales Opportunities
- Maintenance Contracts
- Equipment

Use of Work Days and Work Hours

The actions associated with an escalation rule are executed based on the object assignee's work day information in the following cases:

- The Primary Condition is date or time related
- Work Days is specified in a Secondary Condition related to the *Date Opened*
- Work Hours is specified in a Secondary Condition related to the *Time Opened*

Work day information for a user is defined on the Work Days tab of the User Group Preference panel. If a specific *User Group* is not defined for the object assignee, then the 'Global' user group will be used. If nothing is specified, a work week of Monday - Friday, 9 am - 5 pm in the server time zone is assumed. Refer to the Other Setup Options section of this manual for additional information.

Work day information is not used for rules that are not date/time related. For example, when using a Primary Condition of '<<Field A>> has changed'.

E-Mail Messages Sent From the Escalation Server

The Sender of the e-mail message will be one of the following:

- If the e-mail type for the user who logs into the escalation server is Microsoft Mail or Notes, the e-mail profile selected when the user logs into the escalation server will be used.

- If the e-mail type for the user who logs into the escalation server is SMTP, the Primary E-mail Address defined on the Company Personnel panel for the user will be used.

If the recipient is an internal user, the system will use the primary *E-Mail Address* defined on the Company Personnel panel or the user Name if an e-mail address is not defined. Alternate e-mail addresses can also be selected as a part of the escalation rule.

If the recipient is a contact from an account, the system will use the primary *E-Mail Address* defined on the Account Contact panel. Alternate e-mail addresses can also be selected as a part of the escalation rule.

If the Escalation Server cannot send an e-mail, it will try to send an e-mail to the person defined in Error Handling. If that e-mail also cannot be sent, the following pop-up message will be displayed to all users:

"The Escalation Server cannot send e-mail messages. Notify your system administrator."

Setup Requirements

- Implement the Escalation Server
- Create Escalation Triggers
- Define Work Day information for your user groups
- Define Escalation Rules

Escalation Server

The Escalation Server performs the processing related to the escalation rules that you define.

Implementing the Escalation Server

The Escalation Server is installed on a Windows based machine. Set up a program icon for the Escalation Server. The executable file name for the escalation server is ESSERVER.exe. The Escalation Server can be run simultaneously on the same machine with the Incoming Mail Server. However, this approach may slow down both servers.

The Escalation Server can be run as a Windows service, but you are not required to run this executable as a service. However, if the mail client for the Escalation Server is a Notes client, it cannot be run as a service. Contact Technical Support if you have not received the instructions to create the service.

You must complete the following to implement the Escalation Server:

- Define the appropriate mail system on the System Defaults tab through Set-up Defaults in System administration.
- Identify what user within the system will be used to log into the Escalation Server. Typically a user is defined for the Escalation Server.
- Make sure that the user that is going to be used to login into the Escalation Server is also a valid user in your mail system. The user name identified in *CustomerFirst* and the mail system must match.
- If the e-mail type is not SMTP, when starting the Escalation Server the user must login to the mail system. If the e-mail type is SMTP Mail, you do not need to login to the mail system. However, the user whose ID and Password is used to login to the Escalation Server must have his/her e-mail address entered on the Company Personnel pop-up.
- Identify what machine the Escalation Server will be run on and set up the e-mail client on that machine for the appropriate user.
- Configure the Escalation Server through the following menu options:
 - Options
 - Error Handling
- Define your escalation rules.

Log File

An esserver.log file is created automatically. It reflects the processing that has occurred and any errors that were generated. It is located in the directory where the Esserver.exe code is located.

Escalation Server Options

Menu Bar Choices

<u>F</u> ile	<u>O</u> ption	<u>H</u> elp
<u>E</u> xit	<u>O</u> ptions <u>E</u> rror Handling	<u>T</u> race Oracle Trace

File/Exit

Exits the program.

Option/Options

Displays the Escalation Server Options pop-up box for the user to specify processing options.

Option/Error Handling

Displays the Server Error Handling Option pop-up box for the user to specify error handling options.

Help/Trace

Turns on the tracing feature for the Escalation Server. If trace has never been run from the machine where the Escalation Server is running, the user will be prompted to select the location where the trace file will be stored.

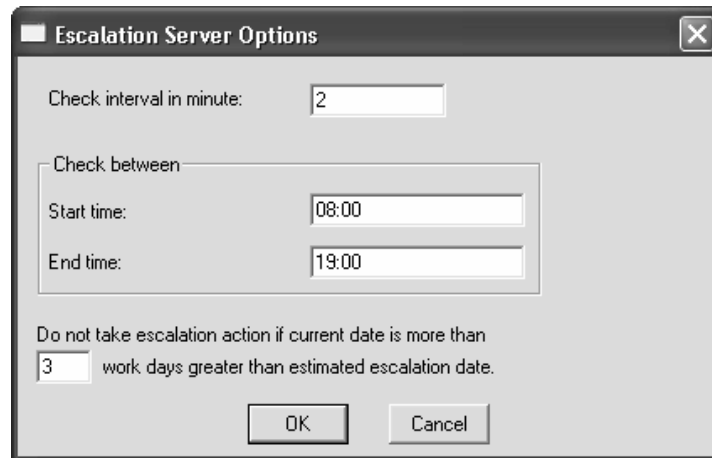
Escalation Server Options Pop-Up Box

This pop-up box allows you to enter the frequency with which the escalation server checks the database, and the time period that the escalation server will run.

Access

From the ESSERVER.exe this pop-up select *Option* and *Options* from the menu bar.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Escalation Server Options". It contains the following elements:

- Check interval in minute:** A text box containing the number "2".
- Check between:** A group box containing two time input fields:
 - Start time:** A text box containing "08:00".
 - End time:** A text box containing "19:00".
- Do not take escalation action if current date is more than** **work days greater than estimated escalation date.**
- Buttons for **OK** and **Cancel** at the bottom.

Pop-Up Box Elements

Check interval in minute

Specifies how frequently the escalation server will process transactions during the period defined by the Start and End hours.

Check between

Specifies the hours during which the escalation server will process transactions at the preset interval.

Do not take escalation action if current date is more than x work days greater than estimated escalation date.

This field is used in conjunction with the expected escalation date to determine if the escalation action should be taken. For example, if a rule is for incidents "older than 2 days" and the *Date Opened* is March 9, 2004 and the *Time Opened* is 10:00, then the expected escalation date/time may be March 11, 2003 at 10:00.

When an action is going to be taken, we will compare the expected escalation date to the current date. If the difference is greater than the number of work days defined in this option, then the action will not be taken. An entry will be made in the Escalation Audit table indicating that this action was not executed because the difference between the expected escalation date and the current date was too big.

The value in this field defaults to 3.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Cancel

Closes the pop-up box without saving the current changes.

Server Error Handling Option Pop-Up Box

This pop-up box allows you to enter information on how the system should handle errors that are encountered by the escalation server.

Access

From the ESSERVER.exe select *Option* and *Error Handling* from the menu bar.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Server Error Handling Option". It contains the following elements:

- A checkbox labeled "Don't display error messages" which is currently unchecked.
- A section titled "When error occurs, notify via Email" containing two text input fields: "Name/Id" and "Email addr".
- A section titled "Specify how many times the server should retry before exit when error occurred." containing a text input field labeled "Retry times" with the value "0".
- At the bottom, there are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

Don't display error messages

If this check box is selected, errors that are encountered by the Escalation Server will not be displayed on the monitor. If error messages are displayed, they may need to be responded to before the Escalation Server can continue processing.

When errors occurs, notify via Email

If an error is encountered an e-mail message will be sent to the address specified in the *Email addr* field for the person identified in the *Name/Id* field.

If the Escalation Server cannot send an e-mail, it will try to send an e-mail to the person defined here. If that e-mail cannot be sent, a pop-up message will be displayed for all users indicating that the escalation server cannot send e-mail messages.

Retry times

Indicates how many times the Escalation server should retry before exiting if an error occurs. Typically this should be set from 5 to 10 retries.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Escalation Triggers

Database triggers must be created for specific tables that are used in the escalation process. When the table is updated, the trigger for that table creates a record in the Object_Updated table. This record is used to create the appropriate escalation records. For example, if you are going to define an Incident escalation rule, then there must be triggers created for the Incident table and the Inc_History table.

The appropriate triggers must be created before you can define an escalation rule. However, you should not create triggers that are not required for the types of rules that you are going to define.

In order to create the escalation triggers in System Administration, the user must log in as the Owner of the database. This would be CSMADMIN unless it was changed during the database installation.

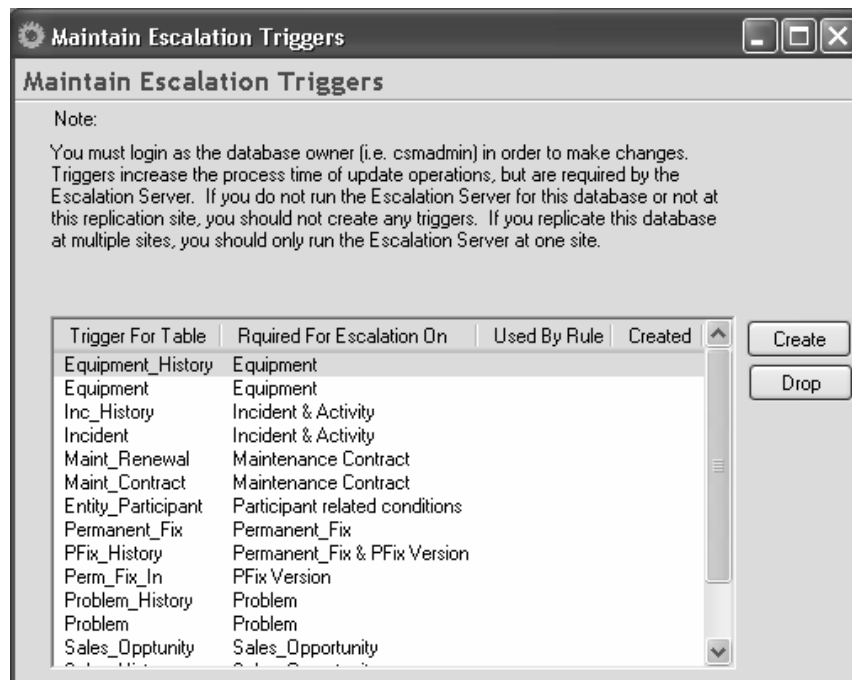
Maintain Escalation Triggers Panel

From this panel you can create the escalation triggers for the specific types of escalation rules that you are going to define. The appropriate triggers must be created before you can define an escalation rule. However, you should not create triggers that are not required for the types of rules that you are going to define.

Access

This panel can be accessed by selecting *Administration* and *Database Related* and *Maintain Escalation Triggers* from the menu bar.

Panel Layout



Field Descriptions

List Box

Displays the tables for which triggers can be created and the related escalation objects.

Trigger For Table

Identifies the table in the database that the trigger will be created for or removed from.

Required For Escalation On

Identifies the type of escalation rule. For example, an Incident escalation rule, an Incident Activity escalation rule, a Problem escalation rule, etc.

Used By Rule

Indicates whether the selected trigger is being used by an existing escalation rule.

List Box Button Controls**Create**

Creates the trigger for the item(s) selected in the list box.

Drop

Removes the trigger for the item selected in the list box.

Escalation Rules

An escalation rule can be defined for the following:

- Incident
- Incident Activity
- Problem
- Permanent Fix
- Permanent Fix Version/Implementation
- Task
- Sales Opportunity
- Maintenance Contract
- Equipment

Escalation rules can be defined at one of three levels:

- **Global** A global rule can apply to any part of the organization. Specific areas can be identified in the conditions. Only a user with Administrative access can define a global rule.
- **Departmental** A departmental rule can only apply to a specific department. Only a department manager or a user with Administrative access can define a departmental rule.
- **Personal** A personal rule can only apply to a specific person and must be created by that person.

Rule Format

The format of an escalation rule is:

“For Object, IF Primary Condition AND Secondary Condition(s) THEN Action(s) FOR Targets(s)”

Primary Condition

The primary conditions available are based upon the *Object* selected.

Secondary Condition(s)

The secondary conditions available are based on the *Object* selected, although some condition values are also based on the *Primary Condition* selected.

Action(s)

The actions available are based on the *Object* selected, although some actions are also based on the *Primary Condition* selected.

Target(s)

The Target(s) available for an escalation rule are dependent upon the *Object* selected and the *Action* selected.

Condition Text

The actual condition text created based on the conditions defined for a rule may need to be modified to format the conditions correctly.

Parenthesis may be required to group the conditions in a particular way. For example, if you have multiple OR conditions for the same *Condition Type*, parenthesis should be used to group those conditions.

AND conditions are processed prior to OR conditions.

Application of Rules

- When a new escalation rule is added it will be applied as appropriate to new objects that are created after the rule is added. The new rule will only be applied to an existing object if the object is modified after the rule is added or reactivated.
- The actions associated with an escalation rule are executed based on the object assignee's work day information in the following cases:
 - The *Primary Condition* is date or time related
 - 'Work Days' is specified in a secondary condition related to the *Date Opened*
 - 'Work Hours' is specified in a secondary condition related to the *Time Opened*

Work day information is not used for rules that are not date/time related. For example, when using a primary condition of '<<Field A>> has changed'.

- For every rule, the system calculates the expected escalation date/time for each escalation action. This is when the escalation rule should be executed. For example, if a rule is for incidents "older than 2 days" and the *Date Opened* is March 9, 2005 and the *Time Opened* is 10:00, then the expected escalation date/time may be March 11, 2005 at 10:00. If a rule is for incidents where the "Status has changed" and it was changed on March 14, 2005 at 11:00, then the expected escalation date/time is March 14, 2005 at 11:00.

There is an escalation option that defines a specific number of work days. When an action is going to be taken, we will compare the expected escalation date to the current date. If the difference is greater than the number of work days defined in this option, then the action will not be taken. An entry will be made in the Escalation Audit table indicating that this action was not executed because the difference between the expected escalation date and the current date was too big. This option defaults to 3 work days, but can be modified on the Setup Defaults panel and the Escalation Server Options panel.

E-mail Messages

When e-mail messages are sent from the escalation server the following hierarchy is used to determine where to send the message:

- An alternative e-mail address field if specified in the escalation rule and defined on the Company Personnel panel

- Primary *E-mail Address* field if defined on the Company Personnel panel and no alternative e-mail addresses were specified in the rule
- E-mail address from your mail system (if address book is available) if no alternative e-mail addresses were specified in the rule and there is no primary e-mail address defined for the user on the Company Personnel panel

The e-mail messages for an escalation rule can be customized using a Form.

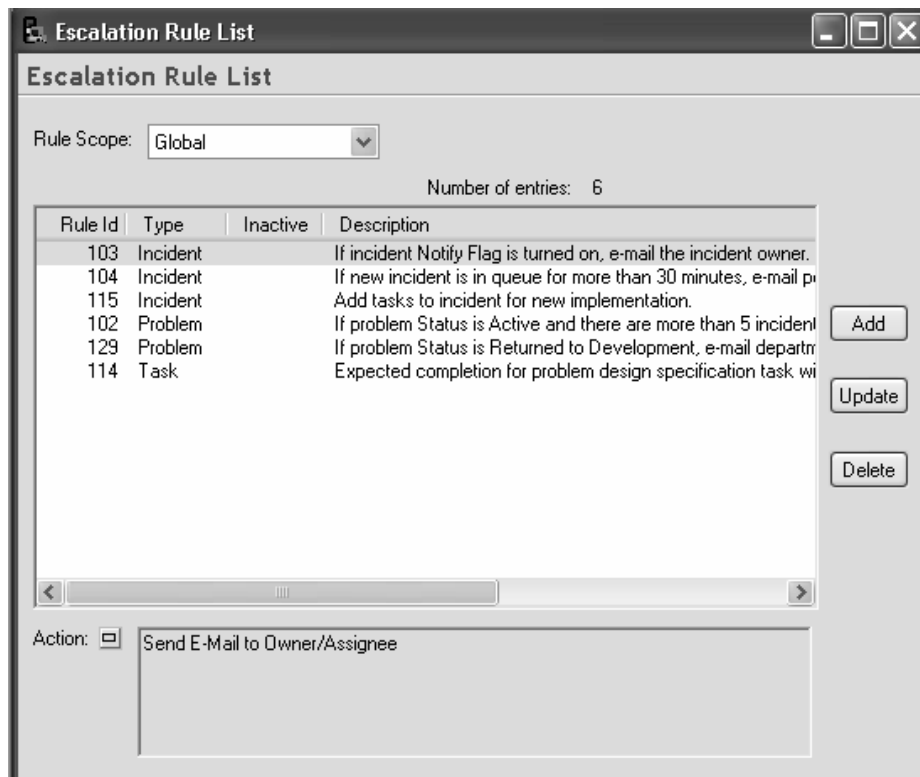
Escalation Rule List Panel

This panel displays the escalation rules that have been defined for the selected Rule Scope. From this panel a user can add, update or delete an escalation rule.

Access

This panel is accessed by clicking on the arrow next to the *Open* icon on the tool bar and selecting *Escalation Rule*. You can also select *File* and *Open* and *Escalation Rule* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays the escalation rules defined for the specified *Rule Scope*.

Action

The actions to be taken when the conditions specified in the rule are met.

List Box Button Controls

Add

Displays the Define Escalation Rule pop-up box to allow the user to add a new escalation rule.

Update

Displays the Define Escalation Rule pop-up box for the selected rule in the list to allow the user to update the rule.

Delete

Deletes the selected escalation rule and all pending escalation actions.

Define Escalation Rule Pop-Up Box

This pop-up box is used to define a new escalation rule or modify an existing rule.

Pop-Up Box Layout

Pop-Up Box Elements

Rule Id (Escalation_Rule.Rule_Id)
Automatically assigned unique Id number for the rule.

Rule Scope (Escalation_Rule.Rule_Scope)
Specifies the range to which the rule is applicable. Valid values are:

Personal

This rule is only applicable to the objects assigned to the current user.

Departmental

This rule is only applicable to the objects owned by the specified department. Only a department manager or users with ADMIN security to the panel can define rules with this scope.

Global

This rule is applicable to all objects in the system. Only users with ADMIN security to the panel can define rules with this scope.

Department

When the selected Rule Scope is 'Departmental', this drop down field allows you to specify the department. If you have ADMIN security to the panel all departments will be listed. If you are a department manager, only the departments which you manage will be shown. This field is not visible when the selected Rule Scope is either 'Personal' or 'Global'.

Primary Condition**Object Type**

The type of object to which the rule applies. Valid values are Contract, Equipment, Inc. Act., Incident, Perm Fix, PFix Vers, Problem, Sales Opp., or Task.

Condition Type

(Escalation_Rule.Aging_Type)

The type of the primary condition used by this rule.

Exists

The entity is an existing object that is not closed. The escalation time is based on the current date and time. Escalation will occur only one time for this type of rule. Valid for incident, permanent fix, permanent fix version/impl, problem, sales opportunity, and task.

Is older than

The entity has been opened for a certain time period and is not closed. The escalation time is based on the *Date/Time Opened*. Escalation will occur only one time for this type of rule. Valid for incident, permanent fix, permanent fix version/impl, problem, sales opportunity, and task.

Has had no action in

No new activities have been entered for the object within the time period selected. Escalation could occur multiple times for this type of rule. Valid for incident, problem, sales opportunity and task.

Owner/Assignee has changed

The *Owner* or *Assignee* of the object has changed. Escalation could occur multiple times for this type of rule. Valid for incident, permanent fix, permanent fix version/impl, problem, sales opportunity, and task.

Priority has changed

The *Priority* of the object has changed. Escalation could occur multiple times for this type of rule. Valid only for incident, problem, and sales opportunity.

Project has changed

The *Project* for the object has changed. Escalation could occur multiple times for this type of rule. Valid only for incident and problem.

Promised/Compl DT passed by

For an incident, the *Promised Date* has passed by the selected time period. For a problem or task, the *Estimated Completion Date* has passed by the

	<p>selected period of time. If the time period is in hours, the estimated completion time is assumed to be the end of the related date. Escalation could occur multiple times for this type of rule.</p>
Promised/Compl DT within	<p>For an incident, the <i>Promised Date</i> is within the selected time period. For a problem or task, the <i>Estimated Completion Date</i> is within the selected period of time. If the time period is in hours, the estimated completion time is assumed to be the end of the related date. Escalation could occur multiple times for this type of rule.</p>
Severity has changed	<p>The <i>Severity</i> of the object has changed. Escalation could occur multiple times for this type of rule. Valid only for incident and problem.</p>
Status has changed	<p>The <i>Status</i> of the object has changed. Escalation could occur multiple times for this type of rule. Valid only for equipment, incident, problem, permanent fix, permanent fix version/impl, sales opportunity, and task.</p>
Status has not changed in	<p>The <i>Status</i> of the object has not changed in the selected period of time. Escalation could occur multiple times for this type of rule. Valid only for equipment, incident, problem, permanent fix, permanent fix version/impl, sales opportunity, and task.</p>
Participants have all completed	<p>All participants for the object have the participant record marked as completed. Escalation could occur multiple times for this type of rule. Valid only for incident, problem, sales opportunity, and task.</p>
No. of work items exceed	<p>The number of work items has exceeded a certain value. Escalation could occur multiple times for this type of rule. Valid for incident, problem, sales opportunity, and task.</p>
Elapsed work time exceed	<p>The cumulative elapsed workable time of the incident has exceeded a certain value. Workable time is any time the incident has not been in an 'Awaiting Documentation' or 'Awaiting Verification' status where it was not workable because a response was required from the account. Escalation will occur only one time for this type of rule. Valid only for incident and task.</p>
Contract Only	
Latest renewal expiration has passed	<p>The <i>Expiration Date</i> for latest renewal for the contract has passed. Escalation could occur multiple times for this type of rule.</p>

Latest renewal expiration is within The *Expiration Date* for latest renewal for the contract is within the selected time period. Escalation could occur multiple times for this type of rule.

Equipment Only

Estimated Repair Date has passed by The *Estimated Repair Date* has passed by the selected period of time. Escalation could occur multiple times for this type of rule.

Estimated Repair Date is within The *Estimated Repair Date* is within the selected period of time. Escalation could occur multiple times for this type of rule.

Is associated with an incident The equipment has been associated with an incident. Escalation will occur one time for each incident for this type of rule.

Operating Status has changed The *Operating Status* of the equipment has changed. Escalation could occur multiple times for this type of rule.

Operating Status has not changed in The *Operating Status* of the equipment has not changed in the selected time period. Escalation could occur multiple times for this type of rule.

Warranty Expiration Date has passed by The *Warranty Expiration Date* has passed by the selected period of time. Escalation could occur multiple times for this type of rule.

Warranty Expiration Date is within The *Warranty Expiration Date* is within the selected period of time. Escalation could occur multiple times for this type of rule.

Incident Only

Callback Date/Time has passed by The *CallBack Date/Time* for the incident has passed by selected period of time. Escalation could occur multiple times for this type of rule.

SLA Hours remaining is less than The time remaining to meet the SLA Hours entered for the incident is less than the selected amount of time. Escalation could occur multiple times.

Incident Activity Only

Has not occurred and condition true for The specific incident activity has not been entered and the secondary conditions have been true for selected period of time. Escalation will occur only one time for this type of rule.

Has not occurred and incident older than The specific activity has not been entered and the

incident is older than the selected period of time. Escalation will occur only one time for this type of rule.

Has not occurred within

The specific activity has not been entered within the selected period of time. Escalation could occur multiple times for this type of rule.

Has occurred

The specific activity has been entered for the incident. Escalation could occur multiple times for this type of rule.

Problem Only

Target Release has changed

The *Target Release* for the problem has changed. Escalation could occur multiple times for this type of rule.

Date/Time Required has changed

The *Date/Time Required* for the problem has changed. Escalation could occur multiple times for this type of rule.

Date/Time Required has passed by

The *Date/Time Required* has passed by the selected period of time. Escalation could occur multiple times for this type of rule.

Date/Time Required is within

The *Date/Time Required* is within the selected period of time. Escalation could occur multiple times for this type of rule.

Sales Opportunity Only

Projected Close Date has passed

For a sales opportunity projection, the projected *Close Date* has passed by the selected time period. If the time period is in hours, the time is assumed to be the end of the related date. Escalation could occur multiple times for this type of rule.

Projected Close Date is within

For a sales opportunity projection, the projected *Close Date* is within the selected time period. If the time period is in hours, the time is assumed to be the end of the related date. Escalation could occur multiple times for this type of rule.

Task Only

Estimated Start Date has changed

The *Estimated Start Date* has changed. Escalation could occur multiple times for this type of rule.

Estimated Start Date has passed by

The *Estimated Start Date* has passed by the selected period of time. Escalation could occur multiple times for this type of rule.

Estimated Start Date is within

The *Estimated Start Date* is within the selected

	period of time. Escalation could occur multiple times for this type of rule.
Problem has new activity	A new activity has been entered for the associated problem. Escalation could occur multiple times for this type of rule.
Problem status has changed	The <i>Status</i> has changed for the associated problem. Escalation could occur multiple times for this type of rule.
Time Value	(Escalation_Rule.Aging_Time)
The amount of time associated with the primary condition.	
Time Unit	(Escalation_Rule.Aging_Time_Unit)
The unit of the Time Value. It can be Minutes, Hours, or Days.	

Secondary Condition

AND/OR

The Boolean operator (AND or OR) to be used to connect this object condition to the next condition.

AND should be used between Not = conditions.

Condition Type

Specifies a field associated with the selected *Object* to be used as a condition in the rule. The fields that are available are dependent upon the object you selected for the rule.

Operator

The operator to be used between the *Condition Type* selected and the *Condition Value* selected. Values in this field are dependent upon the *Condition Type* selected.

Condition Value

Specifies a value for the *Condition Type*. The values in this field are dependent upon the *Object* and *Condition Type* selected.

Add button

Adds the current condition to the end of the Condition edit control. Enclosing quotes will be added as necessary.

Condition Edit Control (Escalation_Rule.Rule_Condition)

The complete text of the conditions for the rule. The user can edit the condition text to format the condition appropriately. If a condition type or a condition value in the condition has more than one word, it must be enclosed with single quotes. In this case if the *Condition Type* or the *Condition Value* contains a single quote in it, the single quote has to be replaced by two consecutive single quotes.

Parenthesis may be required to format the conditions correctly. For example, if you have multiple OR conditions for the same condition type, parenthesis should be used to group those conditions.

AND conditions are processed prior to OR conditions.

In addition, an AND operator must be used with not equal to conditions.

Check button

Checks the syntax of the condition contained in the Condition edit control. This will ensure that the condition's syntax is correct and that the condition types and condition values are valid values. This does not include the use of parenthesis.

Actions/Targets Section

Each action described in this section will be performed one time.

Action	(Escalation_Action.Action_Type_Id)
	Specifies the kind of action to be taken when the rule conditions are evaluated as true. The action is completed for the selected Target.
Add participant	Adds the selected <i>Target</i> as a participant to the object. Available for incident, problem, sales opportunity, and task rules.
Add Task Template	Adds the task(s) for the selected task template to the object. Available for incident, problem, and sales opportunity rules.
Change Status	Changes the <i>Status</i> of the object to the status selected. Available for incident, incident activity, problem, permanent fix, permanent fix version/impl, sales opportunity, and task rules.
Change Incident Status	Changes the <i>Status</i> of the linked incidents to the status selected. Available for problem rules. If the <i>Action</i> or <i>Target</i> is related to an incident, and the Incident Status was selected as a secondary condition, the rule will only be executed for those incidents that have a selected status.
Change Problem Status	Changes the <i>Status</i> for the associated problem. Available for permanent fix and permanent fix version rules.
Close the object	Closes the object. Can only be used with the <i>Primary Condition</i> of 'Participants have all completed'. Available for incident, problem, sales opportunity, and task rules.
Increase Priority	Increase the <i>Priority</i> of the object to the next level based on the sequence defined in Maintain Codes/Code Types. Available for incident, problem and sales opportunity rules.
Reassign	Reassigns the object to the selected target. Available for incident, problem, permanent fix, permanent fix version/impl, sales opportunity, and task rules.
Reassign Problem	Reassigns the problem to the selected <i>Target</i> .

	Available for permanent fix and permanent fix version/impl rules.
Send an alert	Sends an alert to the selected target. Available for, incident, incident activity, problem, permanent fix, permanent fix version/impl, sales opportunity, and task rules.
Send E-Mail	Sends an e-mail message to the selected <i>Target</i> . Available for all objects.
Send E-Mail Alt1 or Alt2	Sends an e-mail message using the alternative e-mail address for the selected <i>Target</i> . Available for all objects.
Set SLA Hours	Sets the SLA Hours for the incident to the value entered. Available for incident rules.
Update the Public Flag	Updates the <i>Public</i> flag to the selected value. Available for incident rules.
Update Activity Public Flag	Updates the <i>Public</i> flag for the activity to the selected value. Available for incident activity rules with a <i>Primary Condition</i> of 'Has Occurred'.
Update Status Public Flag	Updates the <i>Public</i> flag for the Status event to the selected value. Available for incident rules with a <i>Primary Condition</i> of 'Status has changed'.

Target Type

(Escalation_Action.Target_Type_Id)

Allows the user to select a target type for the selected Action. For some actions, specific values are displayed. For other actions, types of targets are displayed.

Values

Status values	For equipment, incident and incident activity, problem, permanent fix, permanent fix version/impl, sales opportunity and task rules, the available statuses for the related object are displayed.
Public flag values	For incident and incident activity rules, the available values for the incident and event <i>Public</i> flag are displayed.
Task Template values	For incident, problem and sales opportunity rules, the available task templates are displayed.

Types

Account Contact Type	For incident and sales opportunity rules, the account contact(s) with the <i>Contact Type</i> specified in the <i>Target</i> field.
Account Relationship Type	For incident and sales opportunity rules, the

	person(s) with the <i>Relationship Type</i> specified in the <i>Target</i> field.
Account Salesperson	For incident and sales opportunity rules, the Salesperson defined for the account.
Account Support Center Mgr	For incident and sales opportunity rules, the manager of the department identified as the <i>Support Center</i> for the account.
Activity Contact.	For incident activity rules, the contact in the <i>Activity Contact</i> field on the activity. This is only available for the <i>Primary Condition</i> of 'Has occurred'.
All Incident Contacts.	For incident and incident activity rules all of the Contacts identified on the Incident panel.
All people in a dept.	For all rules. all of the users in the department specified in the <i>Target</i> field.
All people in Entity department	For task rules, all of the users in the department that the owner of the associated object belongs to.
All people in the dept.	For incident and incident activity, permanent fix, permanent fix version/impl, problem, sales opportunity and task rules, all users in the department where the object is assigned.
Alt Dept Manager 1	For incident and incident activity, permanent fix, permanent fix version/impl, problem, sales opportunity and task rules, the Alt 1 Manager for the department where the object is assigned.
Alt Dept Manager 2	For incident and incident activity, permanent fix, permanent fix version/impl, problem, sales opportunity and task rules, the Alt 2 Manager for the department where the object is assigned.
Alt Dept Manager 3	For incident and incident activity, permanent fix, permanent fix version/impl, problem, sales opportunity and task rules, the Alt 3 Manager for the department where the object is assigned.
Another dept. manager	For all rules, the manager of the department specified in the <i>Target</i> field. This selection requires Administrative access to the panel.
Assoc. Account Contact Type	For equipment rules, the contacts with the selected <i>Contact Type</i> for the associated account (s) identified on the equipment.
Assoc. Account Relationship Type	For equipment rules, the person who has the selected <i>Relationship Type</i> with the associated account(s) identified on the equipment.

Assoc. Account Salesperson	For equipment rules, the <i>Salesperson</i> defined for the Associated account(s) identified on the equipment.
Assoc. Account Support Center Mgr	For equipment rules, the manager of the department identified as the <i>Support Center</i> for the associated account(s) identified on the equipment.
Associated Contacts	For equipment rules, the associated contacts Identified on the equipment.
Contact	For incident and sales opportunity rules, the contact Identified on the object.
Department manager	For incident and incident activity, permanent fix, permanent fix version/impl, problem, sales opportunity and task rules, manager for the department where the object is assigned.
Entity Obj. Assignee	For task rules, the <i>Owner/Assignee</i> of the incident, problem, or sales opportunity associated with the task.
Equipment Contact	For equipment rules, the primary contact Identified in the <i>Contact/User</i> field for the equipment.
Incident Owner	For incident activity and problem rules, the <i>Owner</i> of the related incident(s).
Inc. Account Relationship Type	For incident activity rules, the person(s) with the <i>Relationship Type</i> specified in the <i>Target</i> field for the account on the incident.
Inc. Account Salesperson	For incident activity rules, the <i>Salesperson</i> defined for the account on the incident.
Inc. Account Support Center Mgr	For incident activity rules, the manager of the department identified as the <i>Support Center</i> for the account on the incident.
Me	The user creating the escalation rule. This is available for a rule with a <i>Rule Scope</i> of 'Personal' when the following actions are selected: Alert, E-mail, and Reassign.
Owner/Assignee	For incident and incident activity, problem, task, permanent fix, permanent fix version/impl, and sales opportunity rules, the <i>Owner/Assignee</i> of the object.
Participants	For incident, problem, task and sales opportunity rules, all participants for the object.
Perm Fix Assignee	For problem rules, the <i>Assignee</i> of the permanent fix.

Perm Fix Ver Assignee	For problem rules, the <i>Assignee</i> of the permanent fix version/impl(s).
Problem Assignee	For incident and incident activity, permanent fix and permanent fix version rules, the <i>Assignee</i> of the problem associated with the object.
Previous Assignee	For sales opportunity rules, the previous <i>Salesperson</i> for the sales opportunity.
Problem Participants	For incident and incident activity, rules, all participants for the associated problem.
Problem Submitter	For problem, permanent fix, and permanent fix version rules, the <i>Submitter</i> of the problem.
Specific person	The user specified in the <i>Target Type Value</i> field. For a departmental rule, only personnel within the department can be specified for this action.
Task Assignee	For incident, problem, and sales opportunity rules, the <i>Assignee</i> of the associated task(s).

Target

(Escalation_Action.Action_Target)

Allows the user to select a specific target for the selected Target Type. This field is applicable for the following Target Types:

Account Contact Type	Select a contact type.
Account Relationship Type	Select a relationship type.
Assoc. Account Contact Type	Select a contact type.
Assoc. Account Relationship Type	Select a relationship type.
Inc. Account Contact Type	Select a contact type.
Inc. Account Relationship Type	Select a relationship type.
All people in a dept	Select a department.
Another dept. manager	Select a department.
Specific person	Select a person.

Add button

Adds the currently specified *Action* and related target information to the Actions list box.

Actions List Box

Displays all of the actions and related target information defined for this rule.

List Box Button Controls**Remove**

Removes the currently highlighted row from the Actions list box.

Form

Displays the Forms List pop-up box for the user to select an existing form or create a new form.

No Form

Removes the form for the action currently highlighted.

Rule description

(Escalation_Rule.Rule_Description)

A brief description of the rule. The description will be part of the standard message when the rule's actions are triggered.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Add

Only available if the user is adding a new rule. Adds the rule and clears the fields for the entry of another rule.

Cancel

Closes the pop-up box without saving the current changes.

Section 9

E-mail & Incoming Mail Server

Section 9

E-mail & Incoming Mail Server

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Overview

E-mail is often an effective tool for communicating with people inside or outside of your organization. E-mail has been integrated within the system to make it easier for you to fully utilize this tool.

The following identifies ways in which e-mail messages are used within the system.

- Automatic messages that are generated when specific events occur for sales opportunities, incidents, problems, tasks, temporary fixes, permanent fixes, and permanent fix versions
 - Recipient is defined by the system
 - The primary *E-mail Address* defined on the Company Personnel pop-up box will be used if available. If there is no e-mail address defined, the name of the user will be passed to the e-mail system.
 - The specific message can be defined using a form
- Messages defined for an escalation rule and sent through the escalation facility
 - Recipients can be selected for each rule from a predefined list
 - For internal recipients, the primary *E-mail Address* defined on the Company Personnel pop-up box will be used if available. If there is no e-mail address defined, the Name of the user will be passed to the e-mail system.
 - The alternate e-mail addresses can be used for the recipients
 - The specific message can be defined using a form
- Messages composed and sent using the Send E-Mail pop-up box
 - Recipients can be selected from a list or entered directly
 - Some system default messages are provided
 - Standard messages can be defined using forms
 - Messages can be formatted using 'Plain Text' or 'Rich Text'
 - One or more files can be attached
- Messages received through the Incoming Mail Server
 - Specific types of messages can be processed
 - One or more files can be attached to most messages
 - Replies can be sent to the Sender

This section will focus on general setup requirements, customizing the automatic e-mail messages, and the Incoming Mail Server.

General Setup Requirements

System Definition

The e-mail system that you are using must be defined in System Administration on the System Defaults tab of the Set-Up Defaults panel. The value 'MS Mail' refers to all Microsoft mail systems.

The e-mail system for a specific user can be overridden on the User Profile tab of the User Setup pop-up box. You can access User Setup from the Tools menu option.

E-Mail Addresses

If you are not using an e-mail system that has an address book that *SalesFirst* or *CustomerFirst* can access, then the main *E-Mail Address* for your company personnel must be entered on the Company Personnel pop-up box.

Even if you are using an e-mail system with an address book that the system can access, we recommend that you enter the main *E-Mail Address* for the personnel. If a main *E-Mail Address* is available, it will be used before the name of the person is passed to the e-mail system. Alternate e-mail addresses can also be entered on the Company Personnel pop-up.

E-mail addresses for account contacts must be entered on the Account Contact panel.

Signature Information

Each user can define signature information on the User Setup panel. When the user sends an e-mail from the Send E-Mail pop-up in *CustomerFirst* or *SalesFirst*, this information will be appended automatically to e-mail message if it is not formatted using a form. If you are using a form, the signature information for the current user can be included using the *E-Mail_Signature* under the Format folder.

Options

Default contact to recipient list

This option allows you to indicate whether the Contact on a Contact Activity, Sales Opportunity, Sales Activity, Incident, Incident Activity or other related panels should be automatically added to the To recipients on the Send E-Mail pop-up. The option is located in two places. It is defined on the General Pref. tab of the User Group Preferences panel, and can be overridden for a specific user on the User Profile tab of the User Setup panel. The system default for this option is 'No'.

Confirm Send from Activity pop-up box

This option allows a user to indicate whether a pop-up message should be displayed to confirm that an e-mail message should be sent from the Incident Activity, Problem Activity, Task Activity, and Sales Activity. The option is located on the User Profile tab of the User Setup panel. The system default for this option is not checked.

Suppress Standard E-mail

This option allows a user to indicate whether the e-mail messages generated automatically by the system should be suppressed for the specific user. For example, the e-mail message generated when an item is reassigned to the user. The option is located on the User Profile tab of the User

Setup panel. The system default for this option is not checked. This will not impact e-mail messages generated by the Escalation Server.

Enable the Outlook Interface

This option allows a user to activate the interface to the Microsoft Outlook Calendar. Ticklers and tasks can be placed in the Outlook Calendar for the tickler *Assignee*. The option is located on the User Profile tab of the User Setup pop-up box. The system default for this option is not checked.

In order for a tickler to be placed in the assignee's Calendar:

- The tickler *Assignee* must have the Outlook Interface enabled in *SalesFirst*.
- The *Tickler Date*, *Tickler Start Time*, and *Tickler End Time* must be entered for the tickler.

In order for a task to be placed in the *Assignee's* Calendar:

- The task *Assignee* must have the Outlook Interface enabled in *SalesFirst*.
- The task *Estimated Start Date*, *Estimated Start Time*, *Estimated Complete Date* and *Estimated Complete Time* must be entered for the task.
- The *Add to Calendar* checkbox must be checked for the task.

E-Mail From Name/Address Panel

This panel displays a list of the predefined *From Name* and *Addresses* that were defined by your organization. A predefined *From Name* and *From Address* will be displayed on the Send E-Mail pop-up for selection when an e-mail is sent from *CustomerFirst* or *SalesFirst*. This is useful when you want the sender of the e-mail to be a generic user such as 'RTI Support' and 'support@rti-software.com' rather than a specific person.

Access

To access this panel select *Administration* and *E-Mail From Name/Address* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays a list of the specific subject text that the system should look for in the subject of an e-mail message.

List Box Button Controls

Add

Displays the From Name/Address pop-up box to allow the user to add a new *From Name* and *From Address*.

Open

Displays the From Name/Address pop-up box for the *From Name* and *From Address* selected in the list box.

From Name/Address Pop-Up Box

This pop-up box allows the user to add a new predefined *From Name* and *From Address* or update an existing one.

Pop-Up Box Layout



The screenshot shows a dialog box titled "From Name/Address". It contains two text input fields: "From Name:" and "From Address:". Below these is a checkbox labeled "Inactive". At the bottom are "OK" and "Cancel" buttons.

Pop-Up Box Elements

From Name

Identifies a *From Name* that can be used in conjunction with the *From Address* when sending an e-mail from the Send E-Mail pop-up.

From Address

Identifies a *From Address* that can be used in conjunction with the *From Name* when sending an e-mail from the Send E-Mail pop-up.

Inactive

If checked, the *From Name* and *From Address* will not be displayed for selection on the Send E-Mail panel.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Automatic E-mail Messages Panel

This panel allows the user to do the following:

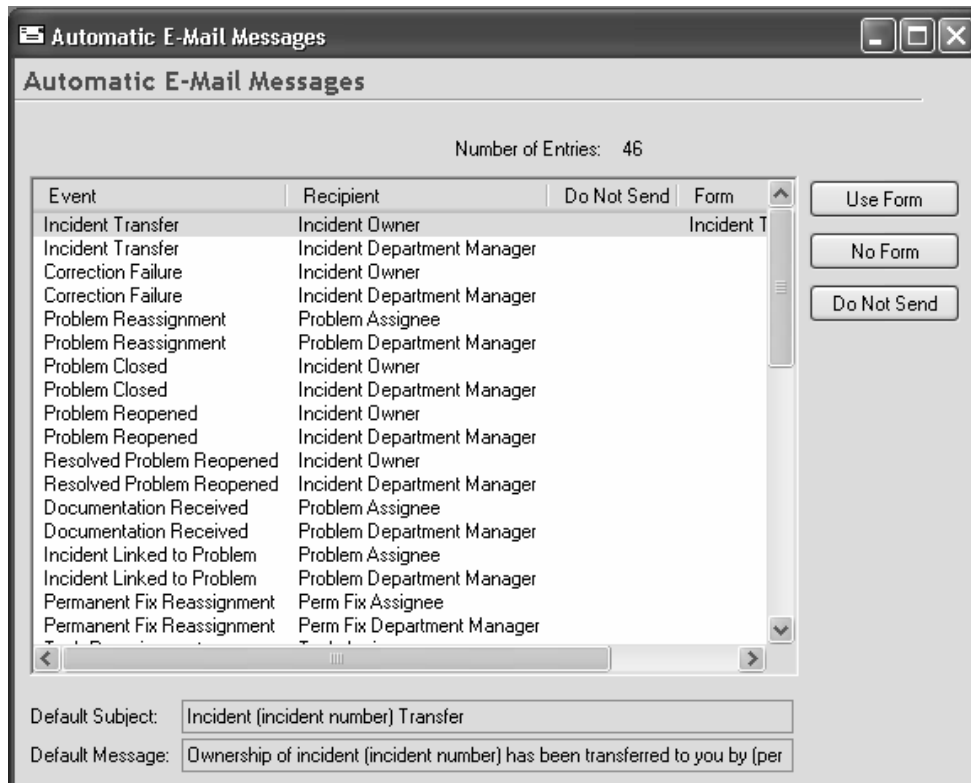
- Indicate whether an automatic e-mail message for a specific event should be sent. The system default is 'Yes'.
- Customize the automatic system generated e-mail messages that are sent for a specific event

The forms functionality is used to customize an e-mail message. Refer to the Forms section in the *CustomerFirst* or *SalesFirst* Reference Manual for more information.

Access

To access this panel select *Administration* and *Automatic E-Mail Messages* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays the events for which you can define e-mail forms.

Related Information

Based on which item in the list is selected, related information is displayed below the list.

Default Subject

The standard *Subject* of the default system generated e-mail message that is sent to the recipient.

Default Message

The standard *Message* of the default system generated e-mail message that is sent to the recipient.

List Box Button Controls**Use Form**

Displays the Forms List pop-up box that allows the user to add a new form for the event highlighted in the list box or update an existing form.

No Form

Removes the specified form from the *Forms* column for the event that is highlighted. If no form is specified for an event, the system default message will be used.

Do Not Send

Turns the *Do Not Send* flag on or off for the event that is highlighted. If the flag is turned on, a 'Y' will be displayed in the *Do Not Send* column. An automatic e-mail message will not be sent for this event.

The Incoming E-Mail Server

Through an e-mail message you can accomplish the following using the Incoming Mail Server:

- Add a contact activity
- Add a new sales opportunity
- Add a new incident
- Add an activity for an existing sales opportunity
- Add an activity for an existing incident
- Add an activity for an existing problem
- Change the Status of an existing incident

As prospects enter information on your web site, you can generate an e-mail message to create a contact activity or a sales opportunity, and submit it to the designated mail box for processing. In addition, instead of reporting incidents via telephone, your customers can report incidents by submitting an e-mail describing the issue to the designated mail box. Incoming e-mail is read and interpreted by the incoming mail server running on the network.

The Incoming Mail Server will periodically check the designated mail box, process the new e-mail messages, create the appropriate entries in the database, and e-mail a reply back to the sender when appropriate. Typically the e-mail must be in a specific format in order for the Incoming Mail Server to be able to interpret the information correctly.

Attachments sent through the Incoming Mail Server are stored in the database regardless of the system default option that indicates whether attachments can be stored in the database.

Implementing the Incoming Mail Server

The Incoming Mail Server is installed on a Windows based machine. Set up a program icon for the Incoming Mail Server. The executable file name for the incoming mail server is INMAIL.exe. The Incoming Mail Server can be run simultaneously on the same machine with the Escalation Server. However, this approach may slow down both servers.

The Incoming Mail Server can be run as a Windows service, but you are not required to run this executable as a service. However, if the mail client for the Incoming Mail Server is a Notes client, it cannot be run as a service. Contact Technical Support if you have not received the instructions to create the service.

You must complete the following to implement the Incoming Mail server:

- Define the appropriate mail system on the System Defaults tab of the Set-Up Defaults panel in System Administration.
- Select specific assignment options for the Incoming Mail Server on the System Defaults tab of the Set-Up Defaults panel.
- Identify what user within the system will be used to log into the Incoming Mail Server. Typically a user is defined for the Incoming Mail Server. This user will appear as the sender of the message.

- Make sure that the user that is going to be used to login into the Incoming Mail Server is also a valid user in your mail system. The user name identified in *CustomerFirst* and the mail system must match. As noted below, for some mail systems, the mail box for this user must be the same mail box where the customers will be sending their e-mails.
- Identify what machine the Incoming Mail Server will be run on and set up the e-mail client on that machine for the appropriate user.
- Configure the Incoming Mail Server through the following menu options:
 - Options
 - Error Handling
 - Response Messages
 - AutoReply Filters
- Provide your customers and internal users with the appropriate e-mail formats.

Running Multiple Incoming Mail Servers

If you want to run additional incoming mail servers, each occurrence must be run on separate machine. You also need to ensure that each incoming mail server is connecting to a different mailbox or mail server.

In addition the following must be completed.

Executing from a Desktop Shortcut

A name for the specific incoming mail server of 30 characters or less must be specified at the end of the *Target* defined in the Properties for the shortcut. The term name must be in lower case. The value must be enclosed in double quotes. The entry would appear as follows:

```
C:\Program Files\RTI\CustomerFirst 5.0\Inmail.exe name="Sales"
```

When an incoming mail server is started with a name specified, a file with the format of 'Inmail-<Name>.log' will be created. This will be used as the log file for the specific incoming mail server. Using the above example the file would be 'Inmail-Sales.log'.

The additional incoming mail servers will use the options defined for the first incoming mail server (the server without a name specified) until they are modified for the additional incoming mail server(s). You must be connected to the appropriate incoming mail server to make the specific changes.

Executing as a Service

When a service is being defined for an additional incoming mail server, populate the *Secondary Inmail Server Name* field with the specific name on the Define Service panel. This field will be enabled when the *Run Inmail Server* box is checked. This should be the same name that is used when executing from the desktop.

Mail Systems

MS Mail and CC Mail

If the mail system is MS Mail (MAPI) or CC:Mail (VIM), the user should log in to the mail system using the id of the mail user whose mail box is receiving the incoming e-mails.

Lotus Notes

If the mail system is Lotus Notes, the user will be prompted for the Notes database file name for the incoming mail box if it has not been specified before. The Notes user's password will be validated at this time. The user has to have the authority to read and to delete documents in that database.

SMTP

Log in to the Incoming Mail Server using the appropriate *CustomerFirst* user. This specific user must have a valid *E-mail Address* specified in the *CustomerFirst* database. Incoming mail is obtained from a POP3 server. The user will be prompted for the *User Id*, *Password*, and the POP3 mail server *Name/IP Address*.

Replies to Incoming Mail

For a new incident, or an incident, problem or sales opportunity activity, standard replies can be sent to the sender of the e-mail message for acknowledgment purposes and for error handling. Error handling replies are not used for a new contact activity or a new sales opportunity.

For a new incident or an incident, problem or sales opportunity activity, using a form you can customize a general reply message for an e-mail message that was processed successfully or an e-mail message that could not be processed due to errors in the message. The specific system message related to an error can be included in the form.

Depending upon the options that you select on the Incoming Mail Server Options pop-up box, in specific situations a reply may or may not be sent to the sender of an e-mail.

Log File

An inmail.log file is created automatically. It reflects the processing that has occurred and any errors that were generated. It is located in the directory where the INMAIL.exe code is located.

Incoming Mail Server Options

Menu Bar Choices

<u>F</u> ile	<u>O</u> ption	<u>H</u> elp
Exit F3	<u>O</u> ptions <u>E</u> rror Handling <u>R</u> esponse Messages <u>A</u> utoReply Filters	<u>T</u> race

File/Exit F3

Exits the program.

Option/Options

Displays the Incoming Mail Server Options pop-up box for the user to specify processing options.

Option/Error Handling

Displays the Error Handling Option pop-up box for the user to specify error handling options.

Option/Response Messages

Displays the Response Messages pop-up box for the user to customize a general reply message for an e-mail message that was processed successfully or an e-mail message that could not be processed due to errors in the message.

Option/AutoReply Filters

Displays the Define Identifiers for AutoReply E-Mails pop-up box to allow the user to identify a list of e-mail subjects that, if encountered, should be removed from the mailbox.

Help/Trace

Turns on the tracing feature for the Inmail Server. If trace has never been run from the machine where the Inmail Server is running, the user will be prompted to select the location where the trace file will be stored.

Common Panel Elements

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Incoming Mail Server Options Pop-Up Box – Options 1 tab

This pop-up box is used to specify options for the Incoming Mail Server.

Access

You can access this pop-up box from the INMAIL.exe by selecting *Option* and *Options* from the menu bar.

Pop-Up Box Layout

The screenshot shows the 'Incoming Mail Server Options' dialog box with the 'Options 1' tab selected. The dialog contains several sections for configuring mail server behavior:

- Check interval in minutes:** A text box containing the value '15'.
- Forward processed mail to:** An empty text box.
- Check between:** Two text boxes for 'Start time' (08:00) and 'End time' (18:00).
- Handling of rejected mail:** Two radio buttons: 'Reply to sender' (selected) and 'Forward to' (with an empty text box).
- Message Subjects:** A list of message subjects with corresponding text boxes:
 - New Incident: Incident Report
 - New Individual Incident: New Individual Incident
 - Incident Activity: Incident <Incident_Id>
 - Change Incident Status: Change Status for Incident <I
 - Problem Activity: Problem <Problem_Id>
 - New Sales Opportunity: New Sales Opp
 - Sales Opp. Activity: Sales Opp. <Opp_Id>
 - Contact Activity: New Contact Activity
- Mail with unrecognized subject:** Three radio buttons: 'Leave in the mail box' (selected), 'Forward to' (with an empty text box), 'Create incident if sender's email addr. exists in database', and 'Create incident anyway'.
- E-mail recipient when Contact Activity is created:** A 'Send to:' text box.
- Set From Address for Incident to predefined From Name/Address if To Address in e-mail matches predefined From Name/Addr:** An unchecked checkbox.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Pop-Up Box Elements

Check interval in minute

Indicates how often the Incoming Mail Server will check the incoming mail box for new messages.

If the mail system is MS Mail, you should adjust the interval for checking new mail accordingly from the MS Mail program by selecting the Mail/Options menu choice. The check interval for the mail program should be set to be shorter than the value specified here.

Check between

Identifies the *Start time* and *End time* between which the Incoming Mail Server will check for new e-mail messages in the incoming mail box and process the messages. If the server will be running 24 hours a day, set the *Start time* to 00:00 and the *End time* to 23:59.

Message Subjects

Identifies the Subjects for the incoming mail that should be processed by the Incoming Mail Server. The handling of an e-mail without a valid Subject is dependent upon other options selected.

New Incident

Specifies the subject of the incoming mail that is submitting a new incident.

New Individual Incident

Specifies the subject of the incoming mail that is submitting a new incident for an account where the account is an individual person. The account and contact are actually the same. This works in conjunction with the *Individual Cust. Flag* on the Account Information panel.

Incident Activity

Specifies the format of the subject of the incoming mail that is submitting an activity for an existing incident. The <Incident_Id> is required. In the actual e-mail's subject, <Incident_Id> should be replaced by the incident number.

Change Incident Status

Specifies the format of the subject of the incoming mail that is changing the *Status* for an existing incident. The <Incident_Id> is required. In the actual e-mail's subject, <Incident_Id> should be replaced by the incident number.

Problem Activity

Specifies the format of the subject of the incoming mail that is submitting an activity for an existing problem. The <Problem_Id> is required. In the actual e-mail's subject, <Problem_Id> should be replaced by the problem number.

New Sales Opportunity

Specifies the subject of the incoming mail that is submitting a new sales opportunity.

Sales Opp. Activity

Specifies the format of the subject of the incoming mail that is submitting an activity for an existing sales opportunity. The <Opp_Id> is required. In the actual e-mail's subject, <Opp_Id> should be replaced by the sales opportunity number.

Contact Activity

Specifies the subject of the incoming mail that is submitting a new contact activity.

Forward processed mails to

Allows you to forward a processed e-mail to another mail box. If this field is blank, the original e-mail message is deleted after it is processed. The deleted message cannot be retrieved.

Handling of rejected mail

Identifies how an e-mail should be handled if it is rejected. You have the option of sending a reply message to the account indicating why the message could not be processed, or you can forward the message to another mail box for review.

Mail with unrecognized subject

Identifies how an e-mail should be handled if it does not have a valid *Subject*. You have the option to leave the message unprocessed in the incoming mail box, forward the message to another mail box for review, create an incident if the sender's e-mail address can be found in the database, or create a new incident for the e-mail. Typically you should not create a new incident if other items are also processed by the Incoming Mail Server.

E-mail recipient when Contact Activity is created

Identifies who should be notified via e-mail when a contact activity is created through the Incoming Mail Server.

Set From Address for Incident to predefined From Name/Address if To Address in e-mail matches predefined From Name/Addr

If checked, if the *From Name* and *Address* for the incoming e-mail matches a predefined *From Name* and *Address*, the *From Name* and *Address* will be stored in the Incident table for the incident. This *From Name* and *Address* will then be used as the default on the Send E-Mail panel when it is accessed from the specific Incident panel.

Incoming Mail Server Options Pop-Up Box – Options 2 tab

This tab is used to specify additional options for the Incoming Mail Server.

Pop-Up Box Layout

The screenshot shows a dialog box titled "Incoming Mail Server Options" with two tabs: "Options 1" and "Options 2". The "Options 2" tab is active. The dialog contains several sections for configuring default values:

- New Incident - If no account is specified in a message, create incident for default account:** A text field labeled "Incident Default Account:" with a selection icon.
- New Incident Activity - Default Values:** A dropdown menu for "Activity Type:" set to "Message" and a checked checkbox for "Public Flag:".
- New Sales Opportunity - If multiple accounts are found, create sales opportunity for default account:** A text field labeled "Opportunity Default Account:" with a selection icon.
- New Contact Activity - If multiple contacts are found, create contact activity for default account:** A text field labeled "Contact Activity Default Account:" with a selection icon.

At the bottom, there are two checkboxes:

- Do not create new account for Sales Opportunity or Contact Activity. Use the Default account.
- If match is found with existing Contact in the database, do not update the existing contact information with the new information.

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

Pop-Up Box Elements

Incident Default Customer

Identifies the account that should be used for a new incident if the actual account cannot be determined.

Activity Type

Identifies the *Activity Type* that should be used for a new incident activity.

Public

Indicates whether an Incident Activity entered through this Incoming Mail Server should be marked as a 'Public' activity. The system default is checked.

Opportunity Default Customer

Identifies the account that should be used for a new sales opportunity if the actual account cannot be determined because multiple accounts have been identified in the database. This default account will

also be used if the *Do not create new customer for Sales Opportunity or Contact Activity. Use the Default Customer* option is checked.

Contact Activity Default Customer

Identifies the account that should be used for a new contact activity if the actual contact cannot be determined because multiple contacts have been identified in the database. This default account will also be used if the *Do not create new customer for Sales Opportunity or Contact Activity. Use the Default Customer* option is checked.

Do not create new customer for Sales Opportunity or Contact Activity. Use the Default Customer.

If this option is checked, if no existing account can be found in the database for a sales opportunity or contact activity, the default account will be used. A new account record will not be created.

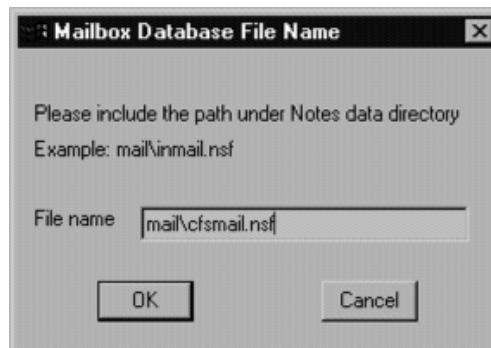
If match is found with existing Contact in the database, do not update the existing contact information with the new information.

If this option is checked, if an existing contact is found in the database based on the information provided in the e-mail for a contact activity or sales opportunity, the existing contact information will not be updated with new information provided. The contact *First Name* and *Last Name* are never updated.

Mailbox Database File Name Pop-Up Box

This pop-up box is used to specify the Lotus Notes database file name for the incoming mail box.

Pop-Up Box Layout



Pop-Up Box Elements

File name

The file name of the Notes database including the sub-directory path under Notes data directory. Normally the sub-directory is Mail. An example would be mail\cfsmail.nsf.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Server Error Handling Options Pop-Up Box

This pop-up is used to define specific options related to how server errors should be handled by the Incoming Mail Server.

Access

You can access this pop-up box from the INMAIL.exe by selecting *Option* and *Error Handling* from the menu bar.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Server Error Handling Option". It contains the following elements:

- A checkbox labeled "Don't display error messages".
- A section titled "When error occurs, notify via Email" containing:
 - A text input field labeled "Name/Id".
 - A text input field labeled "Email addr".
 - A checkbox labeled "Forward emails which are causing error".
- A section titled "Specify how many times the server should retry before exit when error occurred." containing:
 - A text input field labeled "Retry times" with the value "0".
- At the bottom, there are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

Don't display error messages

Indicates that error messages should not be displayed on the machine that is running the Incoming Mail server. The messages will be written to the Inmail.log file that is located in the directory where the Inmail.exe is executed from.

When error occurs, notify via Email

Identifies the e-mail user name/id and E-mail address of the person who should be notified when the server detects an error. For a STMP mail system, both the *Name/Id* and *E-mail addr* fields are required. For other mail systems, only the *Name/Id* field is required.

Forward emails which are causing error

This option deals with cases where the Incoming Mail Server can handle the message, but the content of the message causes an unexpected error in another part of the system logic. If this option is selected, the e-mail message will be forwarded to the *Email Addr* defined above, and deleted from the mail box being processed by the Incoming Mail Server. This allows the Incoming Mail Server to continue processing while you review and correct the message that the system could not handle. The error message is still entered in the Inmail.Log file.

If this option is not selected, for these situations the Incoming Mail Server displays a fatal error message and stops processing.

Retry times

Indicates how many times the Incoming Mail server should retry before exiting if an error occurs. Typically this should be set from 5 to 10 retries.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Response Messages Pop-up Box

This pop-up box is used to customize a general reply message for an e-mail message that was processed successfully or an e-mail message that could not be processed due to formatting issues in the message.

Access

You can access this panel from the INMAIL.exe by selecting *Option* and *Response Messages* from the menu bar.

Pop-Up Box Layout



Pop-Up Box Elements

Mail Type

Identifies the type of incoming e-mail message.

Mail Process Result

Identifies whether the incoming e-mail message was successfully processed or was not able to be successfully processed.

Do not send response back

If checked, no response will be sent to the sender of the message.

Form

Displays the name of the form being used to customize a general reply message.

Use Form button

Displays the Forms List pop-up box for the user to select an existing form or add a new form.

No Form button

Removes the associated form for the selected *Mail Type*. The standard default reply will be sent.

Pop-up Button Controls

Exit

Closes the Response Messages panel.

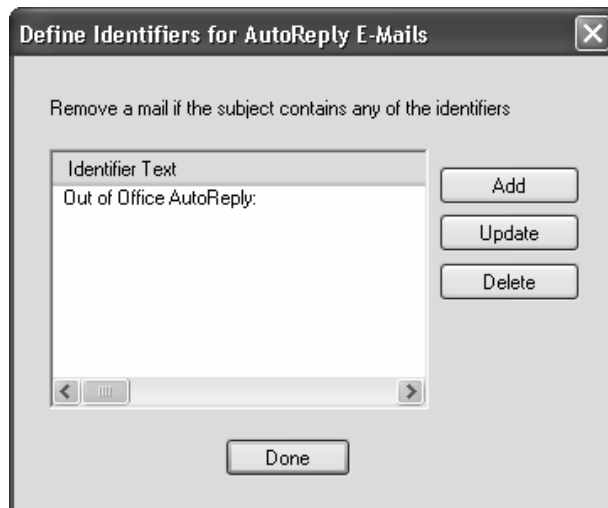
Define Identifiers for AutoReply E-Mails Pop-Up Box

This pop-up box displays a list of the specific e-mail subjects that, if encountered, should be removed from the mailbox. For example, if an e-mail message with a subject contains the phrase 'Out of Office AutoReply' is sent to the mailbox that is being checked by the Inmail Server, this message would be removed from the mailbox so that it was not processed again causing duplication of data entered into the system.

Access

You can access this pop-up box from the INMAIL.exe by selecting *Option* and *AutoReply Filters* from the menu bar.

Pop-Up Box Layout



Pop-Up Box Elements

List Box

Displays a list of the specific subject text that the system should look for in the subject of an e-mail message.

List Box Button Controls

Add

Displays the Add/Update Identifier pop-up box to allow the user to identify an e-mail subject that should be searched for.

Update

Displays the Add/Update Identifier pop-up box to allow the user to update an existing e-mail subject that should be searched for.

Delete

Removes the selected e-mail subject from the list.

Pop-up Button Controls

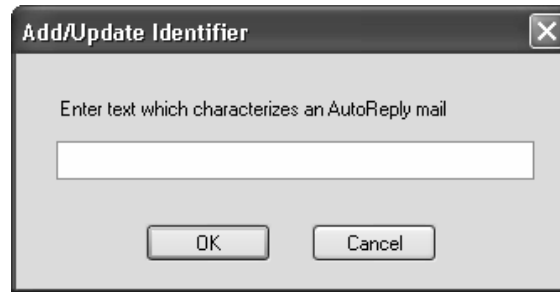
Done

Closes the Define Identifiers for AutoReply E-Mails pop-up box.

Add/Update Identifier Pop-Up Box

This pop-up box is used to identify specific e-mail subjects that, if encountered, should be removed from the mailbox. For example, if an e-mail message with a subject contains the phrase 'Out of Office AutoReply' is sent to the mailbox that is being checked by the Inmail Server, this message would be removed from the mailbox so that it was not processed again causing duplication of data entered into the system.

Pop-Up Box Layout



Pop-Up Box Elements

Enter text which characterizes an AutoReply mail

The text that the system should search for in the subject of an e-mail message.

Pop-up Button Controls

OK

Add the new e-mail subject to the list and closes the Add/Update Identifier pop-up box.

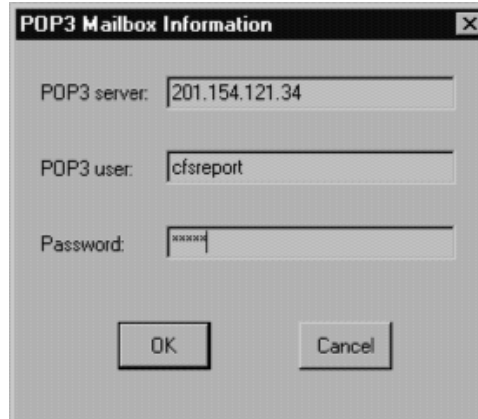
Cancel

Closes the Add/Update Identifier pop-up box and does not add any data.

POP3 Mailbox Information Pop-Up Box

This pop-up box is used to specify the information required to connect to the mail box on the POP3 mail server which receives incoming e-mails.

Pop-Up Box Layout



Pop-Up Box Elements

POP3 Server

The IP address of the POP3 mail server where the mail box is located.

POP3 User

The user id for the mail box on the POP3 mail server.

Password

The password for the user.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Account & Contact Information for New Contact Activity and New Sales Opportunity

The appropriate account and/or contact information should be provided when a contact activity or a sales opportunity is submitted through the Incoming Mail Server. The information may vary depending on what type of e-mail is being submitted and which options you are using.

The related account and/or contact records can be created if they do not already exist in the database, and the appropriate information is provided. A default account can be used for the following:

- If multiple accounts are identified
- If there is no account information provided and a single account cannot be identified from the contact information
- You simply do not want to add new account records through the Incoming Mail Server

An option on the Options 2 tab of the Incoming Mail Server Options panel indicates whether new account records can be added. Based on the system default for this option, new account records will be created. The default account is also defined on this tab.

Another option on the Options 2 tab of the Incoming Mail Server Options panel indicates whether existing contact information should be updated with any new information provided. Based on the system default for this option, existing contacts will be updated.

Formatting

The fields described below can be included when creating new contact activities or sales opportunities. Each field must be presented on a separate line in the message text. Each field begins with the field name followed by a colon. The field labels are not case sensitive. Caps are used for readability.

Specific fields can be used to identify the account and/or contact. Refer to the System Processing topic for further information about how the information is used.

Field Descriptions

Contact_Id: or ContactID:

The unique ID of the contact. Will be used to identify the contact if provided.

Last_Name: or LastName:

The contact's last name. May be used to identify the contact if provided. If a comma is found in the last name it will be replaced with a space so that it can be processed.

First_Name: or FirstName:

The contact's first name. May be used to identify the contact if provided. If a comma is found in the first name it will be replaced with a space so that it can be processed.

Title:

The title for the contact.

Phone:

The phone number for the account and/or contact. May be used to identify the contact if provided.

Mobile_Phone: or MobilePhone:

The mobile phone number for the contact. May be used to identify the contact if provided.

E-mail_Address: or E-MailAddress:

The contact's e-mail address. May be used to identify the contact if provided.

Address_1: or Address1:

The first address line for the account and/or contact.

Address_2: or Address2:

The second address line for the account and/or contact.

Address_3: or Address3:

The third address line for the account and/or contact.

City:

The city in which the account and/or contact is located. May be used to identify the account if provided.

State:

The state in which the account and/or contact is located. May be used to identify the account if provided.

Postal_Code: or PostalCode:

The postal code for the account and/or contact's address.

Country:

The country in which the account and/or contact is located. Must be a valid Country in the Country table.

Lead_Source: or LeadSource:

When an existing Lead Source is identified, the lead source is populated for the contact, for the account if a new record is added, and a contact activity or a sales opportunity if one is added. The lead source must include the full path with a bar between each level.

Contact_Misc1-16: or ContactMisc1-16:

The miscellaneous text fields for the contact.

Contact_Misc_Dropdown1-16: or ContactMiscDropdown1-16:

The miscellaneous dropdown fields for the contact. Valid values are either the long or short values of active codes from the Codes table for Cust_Cont_Misc1-16_Id.

Customer_Id: or CustomerID:

The unique ID of the account. Will be used to identify the account if provided.

Source_Customer_Id: or SourceCustomerID:

A user defined identifier for the account. May be used to identify the account if provided.

Customer_Name: or CustomerName:

The name of the account. May be used to identify the account if provided.

Sales_Region: or SalesRegion:

The name of the Sales Region for the account. If entered, this must contain the name of an existing department that has a Department Type with an Internal Value of 'SALES'.

Cust_Salesperson: or CustSalesPerson:

The name of the salesperson on the account record. If entered, this must contain the name of an existing person in a department with a Department Type with an Internal Value of 'SALES'. This must be entered in the format LastName, FirstName or LastName,FirstName.

Sales_Status: or SalesStatus:

The Sales Status for the account. Valid values are either the long or short values of active codes from the Codes table for Sales_Status_Id.

Type:

The type/category for the account. Valid values are any active values of the Customer_Type table.

Industry

The industry for the account. Valid values are either the long or short values of active codes from the Codes table for Sic_Code_Id.

Activity_Status: or ActivityStatus:

The Activity Status for the account. Valid values are either the long or short values of active codes from the Codes table for Act_Status_Id.

Handling_Status: or HandlingStatus:

The Handling Status for the account. Valid values are either the long or short values of active codes from the Codes table for Hdl_Status_Id.

Customer_Misc1-16: or CustomerMisc1-16:

The miscellaneous text fields for the account.

Customer_Misc_Dropdown1-16: or CustomerMiscDropdown1-16:

The miscellaneous drop down fields for the account. Valid values are either the long or short values of active codes from the Codes table for Customer_Misc1-16_Id.

System Processing

- If a *Customer ID* is provided, and that *Customer ID* does not already exist in the database, the record will be rejected.
- If a *Customer ID* is provided, and that *Customer ID* does exist in the database, that account will be used. All further contact validation will be against that account. Even if the *From E-Mail Address* matches the address for a contact at another account, the account identified by the *Customer ID* provided will be used.
- For a contact activity, if an existing contact cannot be found and the contact *First Name* and *Last Name* are not provided, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

- The following will be used to check for an existing contact:
 - Contact Id or
 - E-Mail Address or
 - Mobile Phone or
 - Contact Phone and Contact Last Name or

If only the *Last Name* is provided the following will be used to check for an existing contact:

- Last Name and Account Information (as identified below)
- If a single contact can be identified that account and contact will be used.
- If multiple contacts match, the *First Name* will be checked for a match. If there is no match on *First Name*, the account information provided will be checked against the account information for the contacts identified. The following will be used if no *Customer ID* or *Source Customer ID* is provided.

If *City* and *State* are provided in the e-mail they must match *Mailing City* and the *Mailing State*. If the *City* and *State* are not provided, only the *Customer Name* will be used.

- Customer Name
- Mailing City
- Mailing State

If a single account and contact can be identified, that account and contact will be used.

If a single account and contact cannot be identified, the contact will be added to the default account defined in the Incoming Mail Server Options. If a default account is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

- If no contact can be found based on criteria used above, the account information provided will be checked against the database. The following will be used if no *Customer ID* or *Source Customer ID* is provided.
 - Customer Name
 - Mailing City
 - Mailing State

If *City* and *State* are provided in the e-mail they must match *Mailing City* and the *Mailing State*. If the *City* and *State* are not provided, only the *Customer Name* will be used.

If a single account can be identified, the contact *Last Name* and *First Name* will be checked. If a single match is found, that contact will be used. If no match is found, the contact will be added to that account if the *First Name* and *Last Name* are provided. If multiple matches are found the contact will be added to the default account defined in the Incoming Mail Server Options. If a default account is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

If no accounts can be found, and a *Customer Name* is provided, based on an option setting a new account will be added or the default account will be used. If contact *First Name* and *Last Name* are provided, a new contact record will be added. If a default account should be used and is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

If no accounts can be found, and no *Customer Name* is provided, if *First Name* and *Last Name* are provided, the contact will be added to the default account defined in the Incoming Mail Server Options. If a default account is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

If multiple accounts are found, if *First Name* and *Last Name* are provided, the contact will be added to the default account defined in the Incoming Mail Server Options. If a default account is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

- For a sales opportunity, if the contact cannot be found and the *First Name* and *Last Name* are not provided, a sales opportunity will be added without the contact. The account information provided will be checked against the database. The following will be used if no *Customer ID* or *Source Customer ID* is provided.
 - Customer Name
 - Mailing City
 - Mailing State

If *City* and *State* are provided in the e-mail they must match *Mailing City* and the *Mailing State*. If the *City* and *State* are not provided, only the *Customer Name* will be used.

If a single account can be identified, that account will be used.

If no accounts can be found, based on an option setting a new account will be added or the default account will be used. If a default account should be used and is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

If multiple accounts are found, the default account defined in the Incoming Mail Server Options will be used. If a default account is not defined, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.

- Address information is shared between the account and contact when a new account and contact are entered. This includes the following fields: *Address_1*, *Address_2*, *Address_3*, *City*, *State*, *Postal_Code*, and *Country*. If the account already exists and just a new contact is being entered, the address information only applies to the contact; the account address information is not updated.
- If a match for the contact is found and the new contact information is different, the existing information for the contact will be updated based on an option on the Options 2 tab of the Incoming Mail Server Options panel. Based on the system default for this option, the contact will

be updated. The contact *Last Name* and *First Name* will not be updated. If blank information is submitted the field will not be updated.

- No account information will be updated for existing accounts. If new information is entered in the e-mail it can be viewed in the contact activity or sales opportunity.

E-Mail Message for New Contact Activity

Contact activities can be processed through the Incoming Mail Server. For example, if you create a formatted e-mail from the information provided by a prospect on your Web Site, you can then send the e-mail message through the Incoming Mail Server to create a contact activity. This will also include the functionality to add an account and/or contact record if the account or contact for the contact activity does not already exist. The default account can be used for the following:

- If multiple accounts are identified
- If there is no account information provided and a single account cannot be identified from the contact information
- You simply do not want to add new account records through the Incoming Mail Server

An option on the Options 2 tab of the Incoming Mail Server Options panel will indicate whether new account records can be added. Based on the system default for this option, new account records will be created. The default account is also defined on this tab.

Another option on the Options 2 tab of the Incoming Mail Server Options panel indicates whether existing contact information should be updated with any new information provided. Based on the system default for this option, existing contacts will be updated.

A tickler will always be created with a contact activity. Default tickler information will be used if not provided in the e-mail message.

When a contact activity is created through the Incoming Mail server the *Origin* field will be populated for the activity to identify where it was created. If a new account or contact record is created, the Origin field for the specific record will be populated to identify where it was created.

The server will periodically check the designated mail box (mail box associated with the user who logged into the Inmail.exe) for any new contact activity messages. For the server to correctly interpret the e-mail message, the message must be in a specific format.

Formatting

A default subject for new contact activities is defined on the Incoming Mail Server Options pop-up box. This can be modified. In order for an e-mail message to be processed normally, the *Subject* must contain the default subject defined on the Options pop-up box.

Any field that you include in the e-mail message must be presented on a separate line in the message text. Each field begins with the field name followed by a colon. The field labels are not case sensitive. Caps are used for readability.

Attachments

Files can be attached to the e-mail. A history record is created with all attachments.

Field Descriptions

Activity_Type: or ActivityType:

The type of contact activity. Valid values are either the long or short values of active codes from the Codes table for SIs_Activity_Id. If no Activity Type is provided the SIs_Activity_Id value with an Internal Value of _MAIL will be used.

Purpose:

The purpose of the contact activity. Valid values are either the long or short values of active codes of the Codes table for Purpose_Id.

Outcome:

The outcome of the contact activity. Valid values are either the long or short values of active codes of the Codes table for Outcome_Id.

Comments:

The comments should not exceed 32000 characters. If the comments are longer than the specified amount, the comments will be truncated. If there are additional fields after the *Comments* field, then EOL must be placed on a separate line after the *Comments* field.

Tickler_Action: or TicklerAction:

The action that should be taken at the time of the tickler. Valid values are either the long or short values of active codes from the Codes table for Tickler_Action_Id.

Tickler_Department: or TicklerDepartment:

The name of the department to whom the tickler will be assigned. A default department can be defined in Set-Up Defaults.

Tickler_Assignee: or TicklerAssignee:

The name of the person to whom the tickler will be assigned. This should be in Last Name, First Name or Last Name,First Name format. A default assignee can be defined in Set-Up Defaults.

Tickler_Priority: or TicklerPriority:

The priority of the tickler. Valid values are either the long or short values of active codes from the Codes table for Tick_Priority_Id.

Tickler_Desc: or TicklerDesc:

The description of the tickler. The tickler description should not exceed 80 characters. If the tickler description is longer than the specified amount, it will be truncated. If there are additional fields after the *Tickler Description* field, then EOL must be placed on a separate line after the *Tickler Description* field.

Activity_Misc_Flag1-2: or ActivityMiscFlag1-2:

The miscellaneous checkbox fields for the contact activity. A 'Y' should be passed for these fields.

Activity_Misc1-2: or ActivityMisc1-2:

The miscellaneous text fields for the contact activity.

Activity_Misc1-2: or ActivityMisc1-2:

The miscellaneous text fields for the contact activity.

Activity_Misc_Dropdown1–2: or ActivityMiscDropdown1–2:

The miscellaneous drop down fields for the contact activity. Valid values are either the long or short values of active codes from the Codes table for Cont_Actv_Misc1-2_Id.

Activity_Misc_Date1–2: or ActivityMiscDate1–2:

The miscellaneous date fields for the contact activity.

Opt_In_Desc: or OptInDesc:

This field allows the user to provide information related to whether the prospect wants to receive communication. If there are additional fields after the *Opt In Desc* field, then EOL must be placed on a separate line after the *Opt In Desc* field.

Example

Below is an example of the e-mail text for a contact activity:

```
CustomerName:ABC Corporation
LastName:Smith
FirstName:Jack
Address1:123 Valley Drive
City:Senaca
State:OH
PostalCode:23456
Country:USA
Phone:512 234-5678
Comments:I would like functional information about each product and pricing information. AP
Manager, GL Manager.
EOL
LeadSource:Web Site
```

System Processing

- The activity contact is determined based on the account and contact information entered with the contact activity. A *Contact* is required. If contact information is not provided, the e-mail is not processed. If the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.
- The account for the activity is determined based on the account and contact information entered with the Contact Activity.

If a *Customer ID* is provided, and that *Customer ID* does not already exist in the database, the record will be rejected.

If a *Customer ID* is provided, and that *Customer ID* does exist in the database, that account will be used. All further contact validation will be against that account. Even if the *From E-Mail Address* matches the address for a contact at another account, the account identified by the *Customer ID* provided will be used.

- The *Activity Date* and *Activity Time* for the contact activity default to the current date and time.

- When a contact activity is added, the *Activity Type* is set to ‘_E-Mail’ (_MAIL) unless a specific type is provided.
- The lead source is populated for the contact activity if identified with the account/contact information. There can be only one lead source for an activity.
- A tickler will always be created when a contact activity is created.
- The *Tickler Contact* will default from the *Activity Contact*.
- The *Tickler Date* and *Tickler Time* default to the current date and time.
- If a *Tickler_Department* and *Tickler_Assignee* are both identified, the *Tickler_Assignee* will be used.
- If no *Tickler_Department* and no *Tickler_Assignee* are identified, the default assignee or department identified on the System Defaults tab of the Setup Defaults panel is used.
- If a contact activity is created, the full e-mail message will be displayed at the bottom of the *Comments* for the activity.
- If the incoming e-mail has a valid *Subject*:
 - The e-mail will be processed, and the e-mail is deleted or forwarded to another mail box.
 - If the e-mail is processed successfully, a contact activity and tickler are created and a reply may be sent back to the sender. If the e-mail cannot be processed successfully, if the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.
 - The text of the original e-mail is included in a reply.
- If the incoming e-mail does not have a valid *Subject*:
 - Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box, or forwarded to another mail box.

E-Mail Message for New Sales Opportunity

New sales opportunities can be processed through the Incoming Mail Server. For example, if you create a formatted e-mail from the information provided by a prospect on your Web Site, you can then send the e-mail message through the Incoming Mail Server to create a new sales opportunity. This includes the functionality to add a new account and/or contact record if the account or contact for the sales opportunity does not already exist. The related account and/or contact records can be created if they do not already exist in the database, and the appropriate information is provided. The default account can be used for the following:

- If multiple accounts are identified
- If there is no account information provided and a single account cannot be identified from the contact information
- You simply do not want to add new account records through the Incoming Mail Server

An option on the Options 2 tab of the Incoming Mail Server Options panel will indicate whether new account records can be added. Based on the system default for this option, new account records will be created. The default account is also defined on this tab.

Another option on the Options 2 tab of the Incoming Mail Server Options panel indicates whether existing contact information should be updated with any new information provided. Based on the system default for this option, existing contacts will be updated.

When a sales opportunity is created through the Incoming Mail server the Origin field will be populated for the opportunity to identify where it was created. If a new account or contact record is created, the *Origin* field for the specific record will be populated to identify where it was created.

The server will periodically check the designated mail box (mail box associated with the user who logged into the Inmail.exe) for any new contact activity messages. For the server to correctly interpret the e-mail message, the message must be in a specific format.

Formatting

A default subject for new sales opportunities is defined on the Incoming Mail Server Options pop-up box. This can be modified. In order for an e-mail message to be processed normally, the *Subject* must contain the default subject defined on the Options pop-up box.

Any field that you include in the e-mail message must be presented on a separate line in the message text. Each field begins with the field name followed by a colon. The field labels are not case sensitive. Caps are used for readability.

Attachments

Files can be attached to the e-mail. A history record is created with all attachments.

Field Descriptions

Opp_Department: or OppDepartment:

The name of the department to whom the sales opportunity will be assigned. A default department can be defined in Set-Up Defaults.

Opp_Salesperson: or OppSalesperson:

The name of the person to whom the sales opportunity will be assigned. This should be in Last Name, First Name or Last Name,First Name format. A default assignee can be defined in Set-Up Defaults.

Stage:

The sales stage of the sales opportunity. Valid values are either the long or short values from active codes from the Codes table for Sales_Stage_Id. If this is not provided the 'Initial' (INIT) value is used.

Priority:

The priority of the sales opportunity. Valid values are either the long or short values of active codes from the Codes table for Sls_Priority_Id.

Product:

This field contains a list of all products in which the account is interested. The product names should be separated by a bar. The format for information entered into this field is as follows: Product: Product A| Product B| Product C.

Summary:

The summary should not exceed 32000 characters. If the summary is longer than the specified amount, an attachment is created in the history with the full text of the message. If there are additional fields after the *Summary* field, then EOL must be placed on a separate line after the *Summary* field.

Sales_Misc1-2: or SalesMisc1-2:

The miscellaneous text fields for the sales opportunity.

Sales_Misc_Dropdown-8: or SalesMiscDropdown1-8:

The miscellaneous drop down fields for the sales opportunity. Valid values are either the long or short values of active codes from the Codes table for Slsop_Misc1-8_Id.

Sales_Misc_Date1-2: or SalesMiscDate1-2:

The miscellaneous date fields for the sales opportunity.

Opt_In_Desc: or OptInDesc:

This field allows the user to provide information related to whether the prospect wants to receive communication. If there are additional fields after the *Opt In Desc* field, then EOL must be placed on a separate line after the *Opt In Desc* field.

Example

Below is an example of the e-mail text for a new sales opportunity:

```
CustomerName:ABC Corporation
LastName:Smith
FirstName:Jack
Address1:123 Valley Drive
City:Senaca
State:OH
PostalCode:23456
Country:USA
Phone:512 234-5678
```

Product:AP Manager|GL Manager
Summary:I would like functional information about each product and pricing information.
EOL
LeadSource:Web Site

System Processing

- The *Date Opened* and *Time Opened* default to the current date and time.
- The account for the sales opportunity is determined based on the account and contact information entered with the Sales Opportunity.

If a *Customer ID* is provided, and that *Customer ID* does not already exist in the database, the record will be rejected.

If a *Customer ID* is provided, and that *Customer ID* does exist in the database, that account will be used. All further contact validation will be against that account. Even if the *From E-Mail Address* matches the address for a contact at another account, the account identified by the *Customer ID* provided will be used.

- The sales opportunity contact is determined based on the account and contact information entered with the opportunity. However a contact is not required for a sales opportunity.
- If an *Opp_Department* and *Opp_Salesperson* are both identified, the *Opp_Salesperson* will be used.
- If no *Opp_Department* and no *Opp_Salesperson* are identified, the assignee or department identified on System Defaults tab of the Setup Defaults panel is used.
- The *Lead Source* is populated for the sales opportunity if identified with the account/contact information.
- The *Tickler Date* and *Tickler Time* for the system created sales opportunity tickler default to the current date and time.
- If a sales opportunity is created, the full e-mail message will be placed in the 'Open' event for the sales opportunity.
- If the incoming e-mail has a valid *Subject*:
 - The e-mail will be processed, and the e-mail is deleted or forwarded to another mail box.
 - If the e-mail is processed successfully, a new sales opportunity is created and a reply may be sent back to the sender with the *Sales Opp ID*. If the e-mail cannot be processed successfully, if the forwarding option has been defined in the Incoming Mail Server Options, the message will be forwarded. Otherwise it will remain in the mail box.
 - The text of the original e-mail is included in a reply.
- If the incoming e-mail does not have a valid *Subject*:

- Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box, or forwarded to another mail box.

E-Mail Message for New Incident

New incidents can be created through the Incoming Mail Server. If a account is not uniquely identified in the e-mail message, the Incoming Mail Server will attempt to determine the contact of the incident by using the sender's e-mail address. If it is able to identify a unique contact, the incident will be created for that account. If you have defined a default account in the Incoming Mail Server Options, and the account cannot be uniquely identified, a new incident will be created for the default account.

The Incoming Mail Server will periodically check the designated mail box (mail box associated with the user who logged into the Inmail.exe) for any new messages. For the server to correctly interpret the e-mail message, the message must be in a specific format.

When an incident is created through the Incoming Mail server the *Origin* field will be populated for the incident to identify where it was created.

Formatting

A default subject for new incidents is defined on the Incoming Mail Server Options pop-up box. This can be modified. In order to effectively control which e-mail messages create an incident, the *Subject* should contain the Default Subject defined on the Options pop-up box. However, there are options available to create an incident for an e-mail that does not have a valid *Subject*.

Any field that you include in the e-mail message must be presented on a separate line in the message text. The *Description* should be the last field. The *Description* can span multiple lines. Each field begins with the field name followed by a colon. The field labels are not case sensitive. Caps are used for readability.

If no specific fields are defined in the e-mail message, if an incident is created, the text in the e-mail message will be put in the incident *Long Description*.

Attachments

Files can be attached to the e-mail. A history record is created with all attachments.

Field Descriptions

For a new incident one of the first five fields can be used to identify the account:

Customer_Number: or **CustomerNumber:**

A valid Customer number.

Customer_Name: or **CustomerName:**

A valid customer name or customer alias name.

License_Number: or **LicenseNumber:**

A valid license number.

Serial_Number: or **SerialNumber:**

A valid product serial number.

Tag_Number: or **TagNumber:**

A valid inventory tag number.

Contact:

First Name and Last Name of the contact. If the Contact is invalid, the *Contact* for the incident is left blank and the Contact must be correctly updated in the incident itself within *CustomerFirst*.

Type:

The type of incident. You can use either the short value or long value of the *Problem_Type_Id* from the Codes table. If left blank, the *Default Incident Type* defined on the Set-Up Defaults panel will be used.

Product:

A valid full product refresh name or product name.

If only a product name is provided in this field (i.e. version, implementation and refresh are not specified), the latest shipped refresh of the product for the account is used. If no refresh of the product is shipped to the account, the latest refresh that has been built for the product is used. If a *Serial_Number* is entered which uniquely identifies a product refresh and this field does not contain a valid full refresh name, then the product refresh identified by the *Serial_Number* will be used.

If a valid product refresh cannot be identified by the data in the e-mail, the default refresh identified in Shipped Products for the account will be used. If there is no default defined, the *Full Refresh* field is left blank on the incident and must be correctly updated in the incident itself within *CustomerFirst*.

Severity:

A valid severity code value. If the severity is invalid, and *Default Incident Type* is 'Question', the severity of the incident created will be left blank. Otherwise, the severity whose sort sequence is in the middle between the highest and lowest sort sequences of severities will be used for the incident. Uses the long value or short value of the *Severity_Id* from the Codes table.

Incident Miscellaneous drop downs1-20:

You can use either the short value or long value of the *Misc_Dropdown1-20* from the Codes table. The field name that is used must be the same as the one defined on the Maintain Table/Column Information panel for *Incident.Misc_Dropdown1-20*.

Public:

A value of 'N' will uncheck the *Public* flag for the incident. If the field is not provided in the e-mail or the value is 'Y', the *Public* flag will be checked for the incident.

Department:

A valid *Department Name*. If provided, the incident will be assigned to this department rather than the Default Department defined in System Administration.

Description:

Text description of the issue. The description should not exceed 32000 characters. If the description is longer than the specified amount, an attachment will be created in the incident history with the full text of the message. If used, this should be the last field defined in the message.

Example

Below is an example of the e-mail text for a new incident:

CustomerName:ABC Corporation
Contact:Jack Smith
Product:Fast Report V2.1 Win G01
Severity:Major
Description:The year end totals are not correct.

System Processing

- If an account and/or contact are not specified in the e-mail, the system will attempt to determine the account and/or contact for the incident by using the sender's e-mail address.
- If an incident is created through the Incoming Mail Server, the *Owner* is the default department defined on the Set-Up Defaults panel. The incident *Status* is 'Initial'.
- If an incident is created through the Incoming Mail Server, and there are no specific fields defined in the e-mail text, the text will be put in the incident *Long Description*.
- If the incoming e-mail has a valid *Subject*:
 - The e-mail will be processed, and the e-mail will be deleted or forwarded to another mail box.
 - If the e-mail is processed successfully, a new incident will be created and a reply will typically be sent back to the sender with the Incident ID. If the e-mail cannot be processed successfully, depending on options defined on the Incoming Mail Server Options pop-up box, the sender will receive a reply that the e-mail has been rejected or the e-mail will be forwarded to another mail box.
 - The text of the original mail will be included in a reply. If rejected, the reply e-mail will identify the errors found in the original e-mail.
- If the incoming e-mail does not have a valid *Subject*:
 - Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box, forwarded to another mail box, or a new incident will be created.

E-Mail Message for New Individual Incident

New incidents for individuals can be processed through the Incoming Mail Server. This includes the functionality to add a new account and contact record if the account and contact for the incident do not already exist. If a new account record is created, the *Individual Cust.* Flag will be checked.

If a match is found with an existing contact and the *Individual Cust.* flag is checked for the account, if the address information included in the e-mail message is different, the address information is updated for the contact and the account.

When an incident is created through the Incoming Mail server the *Origin* field will be populated for the incident to identify where it was created.

The server will periodically check the designated mail box (mail box associated with the user who logged into the Inmail.exe) for any new individual incident messages. For the server to correctly interpret the e-mail message, the message must be in a specific format.

Formatting

A default subject for new individual incidents is defined on the Incoming Mail Server Options pop-up box. This can be modified. In order to effectively control which e-mail messages create an incident, the *Subject* should contain the default subject defined on the Options pop-up box. However, there are options available to create an incident for an e-mail that does not have a valid *Subject*.

Any field that you include in the e-mail message must be presented on a separate line in the message text, The *Description* should be the last field. The *Description* can span multiple lines. Each field begins with the field name followed by a colon. The field labels are not case sensitive. Caps are used for readability.

Attachments

Files can be attached to the e-mail. A history record is created with all attachments.

Field Descriptions

Last_Name:

The contact's last name. This field is required.

First_Name:

The contact's first name. This field is required.

Phone:

The contact's phone number. Either this field or the E-mail_Address is required.

E-mail_Address:

The contact's e-mail address. Either this field or the Phone is required.

Address_1:

The first address line for the contact.

Address_2:

The second address line for the contact.

Address_3:

The third address line for the contact.

City:

The city in which the contact is located.

State:

The state in which the contact is located.

Postal_Code:

The postal code for the contact's address.

Country:

The country in which the contact is located.

Type:

The type of incident. You can use either the short value or long value of the *Problem_Type_Id* from the Codes table. If left blank the *Default Incident Type* defined on the Set-Up Defaults panel will be used.

Product:

A valid Full Product Refresh name or Product Name.

If only a product name is given in this field (i.e. version, implementation and refresh are not specified), the latest shipped refresh of the product for the account is used. If no refresh of the product is shipped to the account, the latest refresh that has been built for the product is used. If a *Serial_Number* is entered which uniquely identifies a product refresh and this field does not contain a valid full refresh name, then the product refresh identified by the *Serial_Number* will be used.

If a valid product refresh cannot be identified by the data in the e-mail, the default refresh identified in Shipped Products for the account will be used. If there is no default defined, the *Full Refresh* field is left blank on the incident and must be correctly updated in the incident itself within *CustomerFirst*.

Severity:

A valid severity code value. If the severity is invalid, and *Default Incident Type* is 'Question', the severity of the incident created will be left blank. Otherwise, the severity whose sort sequence is in the middle between the highest and lowest sort sequences of severities will be used for the incident. Uses the long value or short value of the *Severity_Id* from the Codes table.

Incident Miscellaneous drop downs1-20:

You can use either the short value or long value of the *Misc_Dropdown1-20* from the Codes table. The field name that is used must be the same as the one defined on the Maintain Table/Column Information panel for Incident.*Misc_Dropdown1-20*.

Public:

A value of 'N' will uncheck the *Public* flag for the incident. A value of 'Y' will check the *Public* flag for the incident. If the field is not provided in the e-mail message, the *Public* flag will be checked for the incident.

Department:

A valid *Department Name*. If provided, the incident will be assigned to this department rather than the Default Department defined in System Administration.

Description:

Text description of the issue. The description should not exceed 32000 characters. If the description is longer than the specified amount, an attachment will be created in the incident history with the full text of the message.

Example

Below is an example of the e-mail text for a new individual incident:

Last_Name: Smith
First_Name: Russell
Address_1: 439 West Avenue
City: Chicago
State: IL
Postal_Code: 60606
Phone: 630-515-0780
Description: Cannot connect to the Internet. Get a message related to the modem.

System Processing

- The following is used to check for an existing contact/account:
 - Contact Last Name and
 - Contact First Name and
 - Contact Phone or E-mail Address
- The account for the matching contact has to be an individual account.
 - If not all matching conditions are met, a new account and new contact will be created.
 - If a match is found and the address information is different, the address information is updated for the contact and the account.
 - If multiple contacts match, the e-mail is rejected.
- If a contact/account is created, the *Individual Cust.* flag is set on the new account record. The new account and contact records use the same logic that is used from the Incident panel if a new account is added from there and the *Individual Cust* flag is checked.
- If an incident is created through the Incoming Mail Server, the *Owner* is the default department defined on the Set-Up Defaults panel. The incident *Status* is 'Initial'.
- If the incoming e-mail has a valid *Subject*.
 - The e-mail will be processed, and the e-mail will be deleted or forwarded to another mail box.

- If the e-mail is processed successfully, a new incident will be created and a reply will typically be sent back to the sender with the *Incident ID*. If the e-mail cannot be processed successfully, depending on options defined on the Incoming Mail Server Options pop-up box, the sender will receive a reply that the e-mail has been rejected or the e-mail will be forwarded to another mail box.
- The text of the original mail will be included in a reply. If rejected, the reply e-mail will identify the errors found in the original e-mail.
- If the incoming e-mail does not have a valid Subject:
 - Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box, forwarded to another mail box, or a new incident will be created.

E-Mail Messages for Existing Incidents, Problems, and Sales Opportunities

E-mail can be submitted to add an activity for an existing incident, problem, or sales opportunity.

The Incoming Mail Server will periodically check the designated mail box for any new activity messages for existing objects. The Incoming Mail Server will periodically check the designated mail box for any new activity messages for existing objects. For the server to correctly interpret the e-mail message, the message must be in a specific format.

Formatting

Default subjects for new activities are defined on the Incoming Mail Server Options pop-up box. These can be modified. In order for an e-mail message to be processed normally, the Subject must contain the Default Subject defined on the Options pop-up box and a valid Object ID. The following provides an example of the subject text for an e-mail:

Incident 12345

The actual message text related to the activity must be entered in the message area of the e-mail.

Attachments

Files can be attached to the e-mail message. The attachment(s) will be associated with the specific activity created for the object.

Field Descriptions

Activity_Type:

The type of activity. The *Activity Type* can be identified for an incident activity, problem activity, or sales activity. If used, this field must appear on the first line of the e-mail message, or can be on the second or third line if the *Notify* flag and/or *Public* flag are also used in the e-mail message. The *Activity Type*, *Notify* flag, and *Public* flag must appear before anything else in the message.

If the field is not provided in the e-mail message:

- For an Incident Activity the default *Activity Type* defined for the Incoming Mail Server will be used. If that is not populated, the *Activity Type* of 'Message' will be used.
- For a Problem Activity and a Sales Activity the *Activity Type* of 'Message' will be used.

Notify:

Indicates whether the *Notify* flag should be turned on the related object. The *Notify* flag can be identified for an incident activity, problem activity, or sales activity. If the value is 'N', the *Notify* flag will be unchecked for the activity. If the value is 'Y', the *Notify* flag will be checked for the activity. If the field is not provided and the *Activity Type* is 'Message', the *Notify* flag will be checked for the activity.

If used, this field must appear on the first line of the e-mail message, or can be on the second or third line if the *Activity Type* and/or *Public* flag are also used in the e-mail message. The *Activity Type*, *Notify* flag, and *Public* flag must appear before anything else in the message.

Public:

The *Public* flag can be identified for an incident activity and a problem activity. If the value is 'N', the *Public* flag will be unchecked for the activity. If the value is 'Y', the *Public* flag will be checked for the activity. If the field is not provided in the e-mail message:

- For an Incident Activity the default *Public* flag defined for the Incoming Mail Server will be used. If that is not populated, the *Public* flag will be checked.
- For a Problem Activity the *Public* flag will be checked.

System Processing

- When an incident activity is created, the *Activity Type* will be the type with an Internal Value of 'MESSG'. When a problem activity or sales activity is created, the *Activity Type* will be 'Message'.
- If an activity is created, the *Notify* flag is set for the object.
- If the incoming e-mail has a valid *Subject*:
 - The e-mail will be processed, and the e-mail will be deleted or forwarded to another mail box.
 - If the e-mail is processed successfully, a new activity will be created and a reply will typically be sent back to the sender. If the e-mail cannot be processed successfully, depending on options defined on the Incoming Mail Server Options pop-up box, the sender will receive a reply that the e-mail has been rejected or the e-mail will be forwarded to another mail box.
 - The text of the original mail will be included in a reply. If rejected, the reply e-mail will identify the errors found in the original e-mail.
- If the incoming e-mail does not have a valid *Subject*:
 - Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box or forwarded to another mail box.

E-Mail Message for Changing an Incident's Status

E-mail can be submitted to change the Status of an existing incident.

The Incoming Mail Server will periodically check the designated mail box for any new status change messages for existing incidents. For the server to correctly interpret the e-mail message, the message must be in a specific format.

Formatting

A default subject for changing an incident *Status* is defined on the Incoming Mail Server Options pop-up box. This can be modified. In order for an e-mail message to be processed normally, the Subject must contain the default subject defined on the Options pop-up box and a valid *Incident ID*. The following provides an example of the subject text for an e-mail:

Change Status for Incident 12345

The fields described below must be presented on a separate line in the message text. Each field begins with the field name followed by a colon.

Attachments

Files cannot be attached to a status change e-mail message.

Field Descriptions

Status:

The new Status for the incident. A valid short or long value for Incident_Status_Id from the Codes table can be used. This field is required.

Date:

Must be in the format mm/dd/yy. This field is required.

Time:

Must be in the format hh:mm. This field is required.

Example

Below is an example of the e-mail text for changing an incident status:

Status:Review Completed
Date:10/03/02
Time:13:22

System Processing

- If the *Status* provided has an internal value of INIT, CLOS, or UCLOS, the message will be rejected.
- The *Event Date* and *Event Time* provided will be compared to the *Event Date* and *Event Time* of the last status change event in the incident history.
 - If the Date/Time provided is after the last Date/Time in incident history, the status will be changed and a 'Status' event will be added in the incident history.
 - If the Date/Time provided is prior to the last Date/Time in incident history, the status will not be changed, but a 'Status' event will be added in the incident history.
- If the incoming e-mail has a valid *Subject*:
 - The e-mail will be processed, and the e-mail will be deleted or forwarded to another mail box.
 - If the e-mail is processed successfully, an event history record is created for the incident and a reply will typically be sent back to the sender. If the e-mail cannot be processed successfully, depending on options defined on the Incoming Mail Server Options pop-up box, the sender will receive a reply that the e-mail has been rejected or the e-mail will be forwarded to another mail box.
 - The text of the original mail will be included in a reply. If rejected, the reply e-mail will identify the errors found in the original e-mail.
- If the incoming e-mail does not have a valid *Subject*:
 - Depending upon options defined on the Incoming Mail Server Options pop-up box, the e-mail message will be left in the incoming mail box or forwarded to another mail box.

Section 8

Application Server

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Application Server

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Overview

The Application Server (appsrv.exe) provides the “business logic” behind the user interface for the Java client. It is also used to populate the Current Statistics for the Windows client and the Java client.

The machine running the Application Server must be a “wintel” machine. The Application Server can be run on any number of machines to allow load balancing. These servers should all be on the same LAN as the machine that is running the Data Base Management System (e.g. SQL Server) that they are accessing.

Refer to the Version 5.0 Java Installation instructions for additional information. These are available through the File Download function from the RTI *WebFirst* site.

Use with Windows Client

For the Windows client, the location of where the Application Server is being run from must be identified. The *Application Server Machine Name or IP* field and the *Port* field must be populated on the System Defaults tab of the Setup Defaults panel.

Printer

On the machine where the Application Server is running a printer driver must also be installed and set as the default printer. A laser printer (i.e. HP Laserjet 4 or above) is recommended. It does not have to be connected to an actual printer. If there is not a printer defined for the machine an error message will be displayed at login.

Login

Typically, you should create a user in RTI to run the Application Server. Depending on your environment it may be acceptable to use the same login used for the Escalation Server.

E-Mail

Make sure that the user that is going to be used to login into the Application Server is also a valid user in your mail system. The user name identified in *CustomerFirst* and the mail system must match.

If the e-mail type used is not SMTP, when starting the Application Server the user must login to the mail system. If the e-mail type is SMTP Mail, you do not need to login to the mail system. However, the user whose *ID* and *Password* is used to login to the Application Server must have his/her *E-Mail Address* entered on the Company Personnel pop-up in *CustomerFirst*.

If the e-mail type used is not SMTP, an *SMTP Server* must be defined for the Application Server on the Specify SMTP Server pop-up box in order for manually generated e-mails sent through the Java client to use the *From Name* and *Address* entered on the Send E-Mail pop-up box. If you use another mail type for the Application Server and you have not defined an *SMTP Server* for the application server, all e-mail sent from Java clients will use the e-mail profile of the user logged into the Application Server machine.

Application Server Panel

The Application Server panel identifies status and configuration information for the Application Server.

Access

This panel is displayed when the user logs into the APPSRV.exe.

Menu Bar Choices

File

Refresh Cache
Specify SMTP Server
Restart
Exit

Refresh Cache

Refreshes data cached in memory. This may be necessary if you added a new value that the Java users need access to right away. This includes system setup defaults, user group preferences, characteristic types and values, codes, etc. Some account properties are also cached if the related accounts have been accessed.

The Application Server looks for a time when there are no user activities and then suspends the client connections until the refresh is completed. Normally this task only takes a few seconds and the users are not significantly impacted. However, the time required depends on the amount of data in the database that needs to be cached and the performance of the database server. If the possible impact is a concern, you may want to use the Restart option.

The Application Server automatically refreshes the cache once a day at the defined *Daily Maintenance Time*.

Specify SMTP Server

Displays the Specify SMTP Server pop-up box. that allows the user to identify a SMTP server so that the *From Name* and *Address* will be used from the Send E-mail pop-up box for e-mail sent by the Java clients.

Restart

Starts a new Application Server and moves the connections from the current Application server to the new one. The current Application Server will finish processing all current requests before shutting down. All currently logged in user connections will be maintained and the users' activities will not be interrupted unless there is a technical issue starting a new server.

Exit

Stops and closes the Application Server executable. Java client users will no longer be able to access *CustomerFirst*, *SalesFirst* or *WebFirst*.

Panel Layout

Current Status	
Status	Running
Running Since:	3/1/2006 5:41 PM
Users:	0
Peak Backlog:	0
Total Requests:	0

Configuration				
Maximum Database Connections:	16	Port Number:	8888	
Minimum Request Handler Threads:	1			
Maximum Request Handler Threads:	10			
Hours Of Operation:		to		<input type="button" value="Change"/>
Daily Maintenance Time:	01:00			

Panel Elements

Current Status

Status

Indicates the current status of the Application Server. Valid values are 'Initializing', 'Running', and 'Stopped'. This is a read only field.

Running Since

Identifies when the Application Server was started. This is a read only field.

Users

Displays the number of users currently connected. This is a read only field.

Peak Backlog

Maximum number of users that had to wait for a thread to complete the request. This is a read only field.

Total Requests

The total number of requests from the clients to the Application Server. This is a read only field.

Configuration

For field descriptions refer to the Change Server Settings pop-up box.

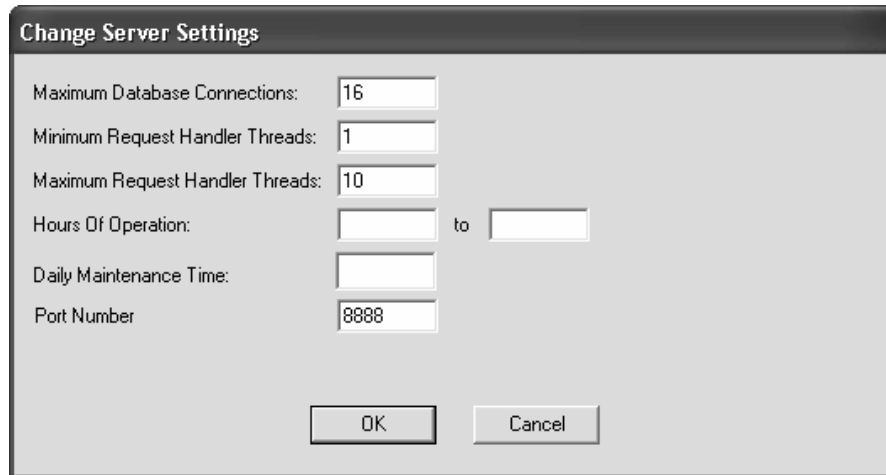
Change (button)

Displays the Change Server Settings pop-up box that allows the user to modify the configuration settings.

Change Server Settings Pop-Up Box

This pop-up box allows the user to modify the configuration settings for the Application Server.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Change Server Settings". It contains the following fields and values:

- Maximum Database Connections: 16
- Minimum Request Handler Threads: 1
- Maximum Request Handler Threads: 10
- Hours Of Operation: [] to []
- Daily Maintenance Time: []
- Port Number: 8888

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

Maximum Database Connections

Identifies the maximum number of database connections that can be made from the Application Server to the database server.

Minimum Request Handler Threads

Identifies the minimum number of threads that should be started when the Application Server is started.

Maximum Request Handler Threads

Identifies the maximum number of threads that can be started simultaneously for serving calls to the Application Server. It is possible for a greater number of users to be connected but they will have to wait for a thread to become available to process their request. When this occurs the *Peak Backlog* field will be populated with the number of users waiting.

Hours of Operation

Identifies the time period that the Application Server will be available for requests. A Blank value indicates that requests will be accepted 24 hours a day. You may want to stop the Application Server based upon when the database backups are being performed.

Daily Maintenance Time

Identifies the time the Application Server should perform its daily internal maintenance. Client connections will be suspended during this time so you want to specify a time when there will be minimal user activities. It is important that the database server is not stopped during this time.

Port Number

The port on which the Application Server listens.

Pop-up Button Controls**OK**

Closes the Change Server Settings pop-up box and saves the changes.

Cancel

Closes the Change Server Settings pop-up box and does not save any changes.

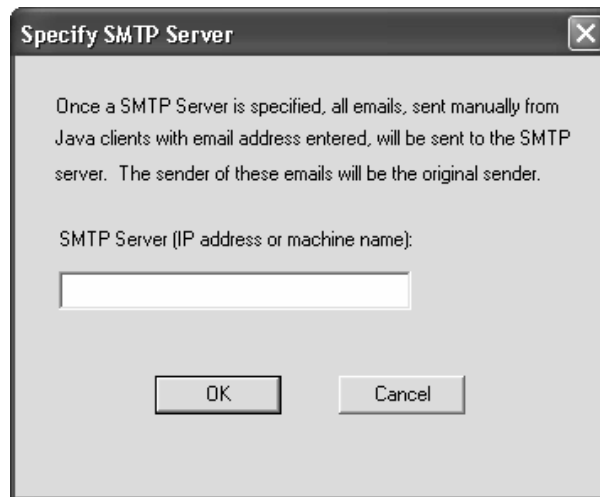
Specify SMTP Server Pop-Up Box

If an *SMTP Server* is identified for the Application Server, all manual e-mails sent through the Java client will use the *From Name* and *Address* entered on the Send E-Mail pop-up box. If you use other mail types for the Application Server and you have not defined an *SMTP Server* for the Application Server, all e-mail sent from the Java clients will use the e-mail profile of the user logged into the Application Server machine.

Access

To access this pop-up, select *File* and *Specify SMTP Server* from the menu bar of the Application Server panel.

Pop-Up Box Layout



Pop-Up Box Elements

SMTP Server

Identifies the IP address or the machine name for the SMTP server.

Pop-up Button Controls

OK

Closes the Specify SMTP Server pop-up box and saves the changes.

Cancel

Closes the Specify SMTP Server pop-up box and does not save any changes.

Section 7

Other Setup Options

Section 7

Other Setup Options

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Set-Up Defaults Panel

This panel is used to define system level options. Some of the options have initial default values defined. These options apply to all users in the system.

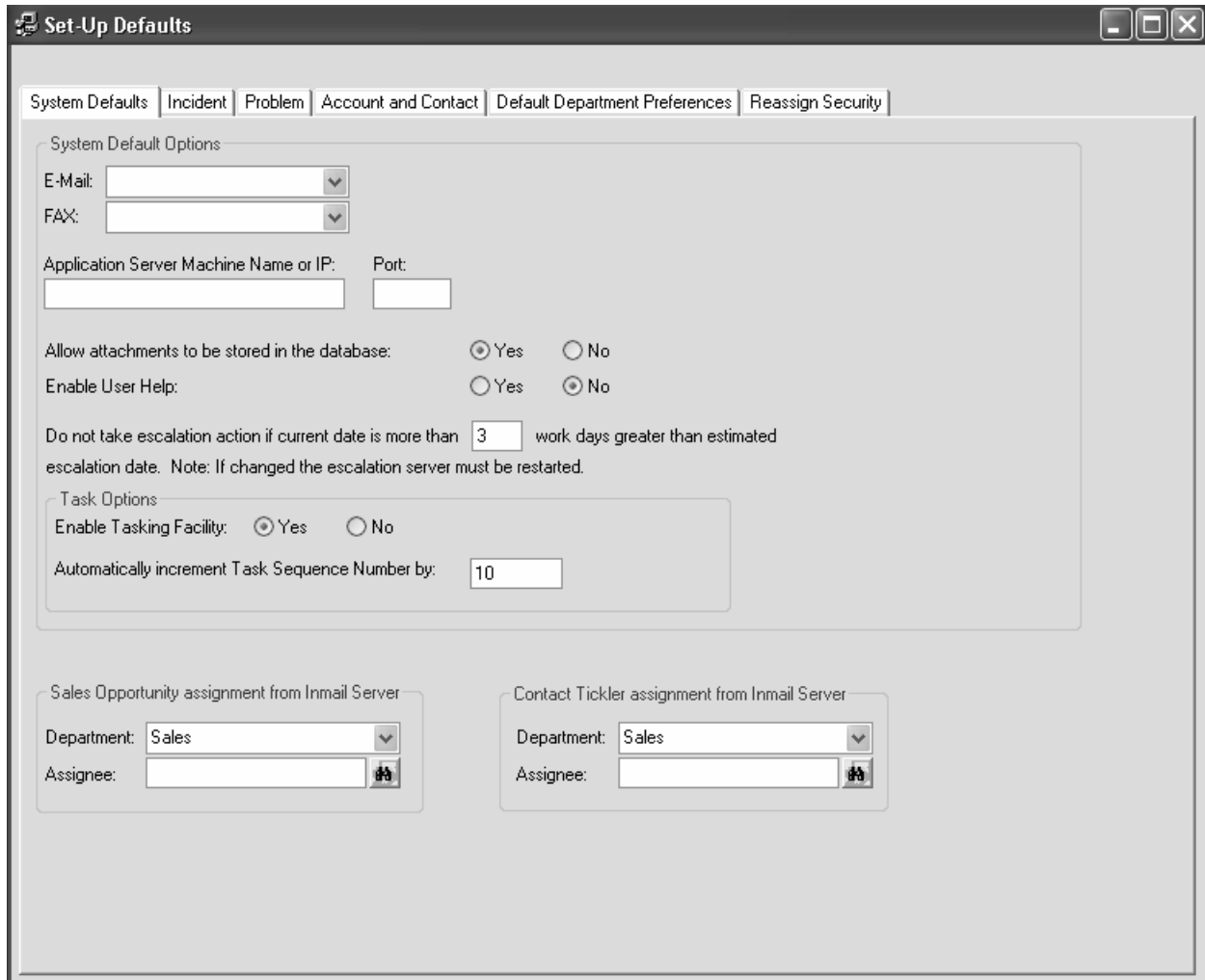
Access

To access this panel select *Administration* and *Set-up Defaults* from the menu bar.

System Defaults Tab

This tab allows you to define general system options.

Panel Layout



The screenshot shows the 'Set-Up Defaults' window with the following configuration options:

- System Default Options:**
 - E-Mail: [Dropdown menu]
 - FAX: [Dropdown menu]
 - Application Server Machine Name or IP: [Text field]
 - Port: [Text field]
 - Allow attachments to be stored in the database: Yes No
 - Enable User Help: Yes No
 - Do not take escalation action if current date is more than work days greater than estimated escalation date. Note: If changed the escalation server must be restarted.
- Task Options:**
 - Enable Tasking Facility: Yes No
 - Automatically increment Task Sequence Number by:
- Sales Opportunity assignment from Inmail Server:**
 - Department: [Dropdown menu] Sales
 - Assignee: [Text field]
- Contact Tickler assignment from Inmail Server:**
 - Department: [Dropdown menu] Sales
 - Assignee: [Text field]

Panel Elements

E-Mail (User_Ins_Default.Email_Type_Id)
The type of e-mail interface to be used by the system.

Mailbox
If you select 'Lotus' in the *E-mail* field, the *Mailbox* field is displayed. This allows you to select the mailbox used for sending e-mail.

SMTP Server
If you select 'SMTP Mail' in the *E-mail* field, the *SMTP Server* field is displayed. This allows you to select the server used for sending e-mail.

FAX
The type of fax interface to be used by the system.

Application Server Machine Name or IP
The name or IP Address of the machine where the Application Server executable is running. This is required if you want to use the Current Statistics for the Windows client.

Port
Identifies the port on which the Application Server is listening. If this field is blank, port 8888 is assumed.

Allow attachments to be stored in the database (User_Ins_Default.Attach_DB)
This option identifies whether attachments that are added through *CustomerFirst* or *SalesFirst* can be stored in the database. When the Incoming Mail Server is being used, attachments submitted through the Incoming Mail Server will always be stored in the database regardless of how this option is set. The system default is 'Yes'.

Enable User Help
Enables the "User Help" menu choice on the menu bar. This menu choice will load a user-defined Windows Help file named CFSHELP.HLP. The system default is 'No'.

Do not take escalation action if current date is more than XX work days greater than estimated escalation date
Identifies the number of work days after an escalation rule was expected to be executed that the escalation action should not be taken. This defaults to 3 days but can be overridden.

Enable Tasking Facility
Enabling the Tasking Facility activates the task related fields and menu choices. The task related fields and menu choices are hidden if the Tasking Facility is disabled. The system default is 'Yes'.

Automatically increment Task Sequence Number by
Identifies the incremental value for task sequence numbers when they are assigned by the system. The default value is 10. This field is disabled if the Tasking Facility is disabled. The system default value is '10'.

Sales Opportunity assignment from Inmail Server
Identifies where a sales opportunity that is created through the Incoming Mail Server should be assigned. This is a required field. The system default value for the Department is 'Sales'.

Contact Activity assignment from Inmail Server

Identifies where a contact activity that is created through the Incoming Mail Server should be assigned. This is a required field. The system default value for the Department is 'Sales'.

Incident Tab

This tab contains the options that impact incident processing.

Panel Layout

The screenshot shows the 'Set-Up Defaults' window with the 'Incident' tab selected. The window title is 'Set-Up Defaults' and it has standard window controls. The tabs at the top are: System Defaults, Incident (selected), Problem, Account and Contact, Default Department Preferences, and Reassign Security.

The 'Incident Related Options' section contains the following settings:

- Default Incident Type for incidents NOT created via CustomerFirst: Question (dropdown)
- Default Department: Customer Support (dropdown)
- Display Add button to add a new account on Incident panel: Yes No
- Allow users to enter new contact names directly in the Contact field on Incident panel: Yes No
- Users can override Incident Date/Time Opened: Yes No
- Allow incidents to be reopened: Yes; but only by Administrators Yes; by any user No
- Create Sales Opportunity history record when new incident is added: Yes No

Days before incidents in a "waiting" Status reappear in Work Items:

ADOC	7	UWAIT	7	ATASK		ARES	7	AVER	7	AFIX	7
------	---	-------	---	-------	--	------	---	------	---	------	---

Options for setting incident(s) to 'Respond to Account' when closing the problem:

- Always set incident(s) to 'Respond to Account' when closing the problem.
- Never set incident(s) to 'Respond to Account' based on closing the problem.
- Set incident(s) to 'Respond to Account' when a product build is created that contains the fix.
- Set incident(s) to 'Respond to Account' when closing the problem and there is no fix.

Panel Elements

Default Inc. Type for Incidents NOT created via CustomerFirst

(User_Ins_Default.Incident_Type_Id)

The default *Incident Type* value for the incidents created through the Incoming Mail Server or *WebFirst*. The system default value is 'Question'. This value is used if an *Incident Type* is not identified in the e-mail message or specifically selected in *WebFirst*.

Default Department

(User_Ins_Default.Def_Dept_Owner_Id)

The default value for the incident *Department* field if an incident is created by an Operator (OPER) or through *WebFirst*. For the Incoming Mail Server this value will be used if the *Department* is not identified in the e-mail message. If the default department varies by product or other criteria, more

than one department can be specified by using the Default Department Preference tab on the Set-Up Defaults panel. The system default value is 'Customer Support'.

Display Add button to add a new account on Incident panel

(User_Ins_Default.Add_Cust_Inc)

If 'Yes' is selected, an *Add* button is displayed next to the *Account* field on the Main tab of the Incident panel to add a new account. If you click on the *Add* button, a new Account Information panel is displayed. The system default value is 'Yes'.

Allow users to enter new contact names directly in the Contact field on the Incident panel

(User_Ins_Default.Contact_Add)

This option allows the user to specify whether or not a new contact name can be entered directly into the *Contact* field on the Main tab of the Incident panel. The name must be in the format Last Name, First Name. There is a higher risk of duplicate contacts being entered when this option is selected. If 'No' is selected, the *Add* button should be displayed to allow entry of a new contact for the account on the Contact panel. The system default value is 'No'.

Users can override Incident Date/Time Opened

(User_Ins_Default.Inc_Open_Date)

Indicates whether a user can override the *Date Opened* and *Time Opened* fields on an incident. If 'Yes' is selected, anyone can change the *Date Opened* and *Time Opened* on an incident. The Date Opened and Time Opened will be changed on the Main tab of the Incident panel. However, the Open event in the incident Event History will still reflect the actual date and time the incident was entered in *CustomerFirst*. If 'No' is selected, the *Date Opened* and *Time Opened* fields are disabled on the Main tab of the Incident panel. The system default value is 'No'.

Allow incidents to be reopened

(User_Ins_Default.Closed_Incs)

Indicates if incidents can be reopened once they have been closed. If 'Yes; but only by Administrators' is selected, only users with a *User Class* of 'Admin' can reopen a closed incident. If 'Yes; by any user' is selected, any user can reopen a closed incident regardless of their user class. If 'No' is selected, no one can reopen a closed incident. The system default value is 'No'.

Create Sales Opportunity history record when new incident is added

(User_Ins_Default.NewInc_SlsHistory)

If 'Yes' is selected, each time a new incident is created for an account associated with a sales opportunity, an Auto history record is created and inserted into the sales opportunity history indicating the new Incident Id.

Days before incidents in a "waiting" Status reappear in Work Items

Indicates the number of days before an incident in a *Status* with one of the following internal values will reappear in the owner's Work Items list.

ADOC

(User_Ins_Default.Wait_Inc_ADOC)

The number of days that incidents in a *Status* with an Internal Value of ADOC will not appear on the owner's work items list.

UWAIT

(User_Ins_Default.Wait_Inc_UWAIT)

The number of days that incidents in a *Status* with an Internal Value of UWAIT will not appear on the owner's work items list.

ATASK

The number of days that incidents in a *Status* with an Internal Value of ATASK will not appear on the owner's work items list.

ARES

(User_Ins_Default.Wait_Inc_ARES)

The number of days that incidents in a *Status* with an Internal Value of ARES will not appear on the owner's work items list.

AVER

(User_Ins_Default.Wait_Inc_AVER)

The number of days that incidents in a *Status* with an Internal Value of AVER will not appear on the owner's work items list.

AFIX

(User_Ins_Default.Wait_Inc_AFIX)

The number of days that incidents in a *Status* with an Internal Value of AFIX will not appear on the owner's work items list.

Always set incident(s) to 'Respond to Account' when closing the problem.

If this is selected, when a problem is closed, the associated incident *Status* is automatically set to 'Respond to Account' (RESP). This is the system default value.

Never set incident(s) to 'Respond to Account' based on closing the problem.

If this is selected, when a problem is closed, the associated incident *Status* is never automatically set to 'Respond to Account' (RESP).

Set incident(s) to 'Respond to Account' when a product build is created that contains the fix.

If this is selected, when a new product build is created in Product Information that contains a fix for the *Full Refresh* identified on the incident, the incident *Status* is set to 'Respond to Account' (RESP). If this option is selected, the *Set incident(s) to 'Respond to Account' when closing the problem and there is no fix* check box is enabled.

The *Incorporated Status* and *Date* for each version/implementation on the permanent fix are used in conjunction with the *Version/Implementation*, *Refresh Category*, and *Date/Time Built* in Product Information to determine if a fix is included in a specific build.

Set incident(s) to 'Respond to Account' when closing the problem and there is no fix.

If this is selected, when a problem is closed and there is no permanent fix for the problem, all associated incident statuses will be changed to 'Respond to Account' (RESP). This check box is only available if the *Set incident(s) to 'Respond to Account' when a product build is created that contains the fix* radio button is selected.

Problem Tab

This tab contains the options that impact problem processing.

Panel Layout

Set-Up Defaults

System Defaults | Incident | **Problem** | Account and Contact | Default Department Preferences | Reassign Security

Problem Default Options

Days before Problems in Waiting Status Reappear in Work Items:

ADOC UWAIT ATASK WAIT

Display only permanent fix in work items even if user owns one or more versions/implementations

Display permanent fix and all assigned versions/implementations in work items if user owns both

Source Code Management Related Options

Cannot incorporate fixes if modules are locked

Cannot incorporate fixes if modules are not in production

Panel Elements

Days before Problems in Waiting Status Reappear in Work Items

Indicates the number of days before a problem in a *Status* with one of the following internal values will reappear in the assignee's Work Items list.

ADOC

(User_Ins_Default.Wait_Pr_b_ADOC)

The number of days that problems in a *Status* with an Internal Value of ADOC will not appear on the assignee's work items list.

UWAIT

(User_Ins_Default.Wait_Pr_b_UWAIT)

The number of days that problems in a *Status* with an Internal Value of UWAIT will not appear on the assignee's work items list.

ATASK

The number of days that problems in a *Status* with an Internal Value of ATASK will not appear on the assignee's work items list.

WAIT

(User_Ins_Default.Wait_Prbl_WAIT)

The number of days that problems in a *Status* with an internal value of WAIT will not appear on the assignee's work items list.

Display only permanent fix in work items even if user owns one or more versions/implementations

If this radio button is selected, only the permanent fix will display in the user's work items list if the user is assigned both the permanent fix and one or more versions/implementations of the permanent fix. This is the system default.

Display permanent fix and all assigned versions/implementations in work items

If this radio button is selected, the permanent fix and the assigned versions/implementations for the user will display in the user's work items list if the user is assigned both the permanent fix and one or more versions/implementations of the permanent fix.

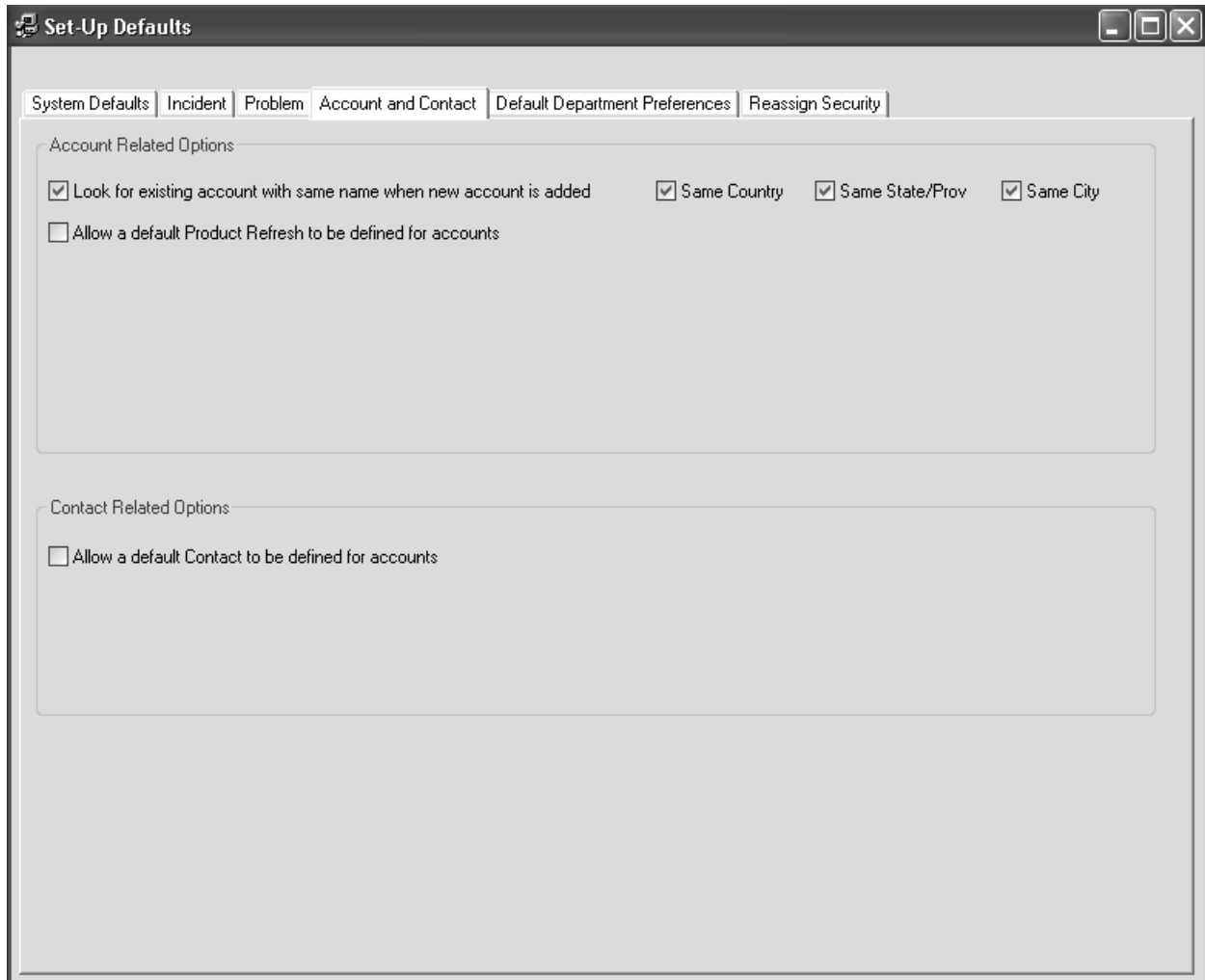
Source Code Management Related Options

These options are only used with the PVCS interface.

Account and Contact Tab

This tab contains options related to accounts and contacts.

Panel Layout



Panel Elements

Look for existing account with same name when new account is added

If checked, the system will look for an existing account in the database when a new account is added based on the *Account Name* and the *Country*, *State/Prov* and/or *City* as specified in the related checkboxes. If one or more matches are found the Similar Account(s) pop-up box will be displayed. These checkboxes are checked by default.

A *Remove_BegChar_Id* field and a *Remove_EndChar_Id* field can be accessed through Maintain Codes and Code Types. Values defined for *Remove_BegChar_id* field will be removed from the *Account Name* when looking for an existing account if followed by a comma or a space. Values defined for *Remove_EndChar_id* field will be removed from the *Account Name* when looking for an

existing account if preceded by a comma or a space. All punctuation and special characters will then be removed and the case of an *Account Name* will be ignored.

For example, if there is an existing account named Hanover Systems, Inc. and a new account is added named Hanover Systems Company, the two names would be compared as Hanover Systems and a match would be found.

Allow a default Product Refresh to be defined for accounts

This option allows you to specify a default product refresh for an account. If a default is defined, this refresh will be displayed in the *Full Refresh* field on the Main tab of the Incident panel. The product refresh can be overridden if it is not correct for the incident.

Allow a default Contact to be defined for Accounts

This option allows you to specify whether or not a default contact can be defined for accounts. If a default contact is defined for an account, it is displayed in the *Contact* field on the Main tab of the Incident panel for a new incident. The contact name can be overridden if it is not correct for the incident. NOTE: Allowing default contacts to be defined imposes additional system overhead. If you are not going to define default contacts, make sure that this is turned off.

Default Department Preferences Tab

This panel is used to define the initial criteria that determines which department will be assigned a new incident entered by an "Operator", through *WebFirst*, or through the Incoming Mail Server.

When this panel is used, a *User Group*, *Product*, *Maintenance Type*, or *Support Center* must be entered along with the target *Default Department* for those criteria. *Product* represents the product selected on the incident, *Maintenance Type* is related to the maintenance contract selected on the incident, *User Group* is the operator's user group, and *Support Center* is the support center for the account on the incident.

The default department for an incident is determined in the following manner:

The system searches the Default Department table for a default department record that matches the product, user group, maintenance type, and account support center of the incident. If a record does not specify one or more criteria (for example, *Support Center* is left blank) that record is skipped.

If an exact match was not found, the system will find the closest match using the remaining default department records. Blank fields are ignored (i.e., if you do not specify a *Support Center*, any support center will be considered a match). The record that matches the greatest number of criteria is considered the closest match. An example follows:

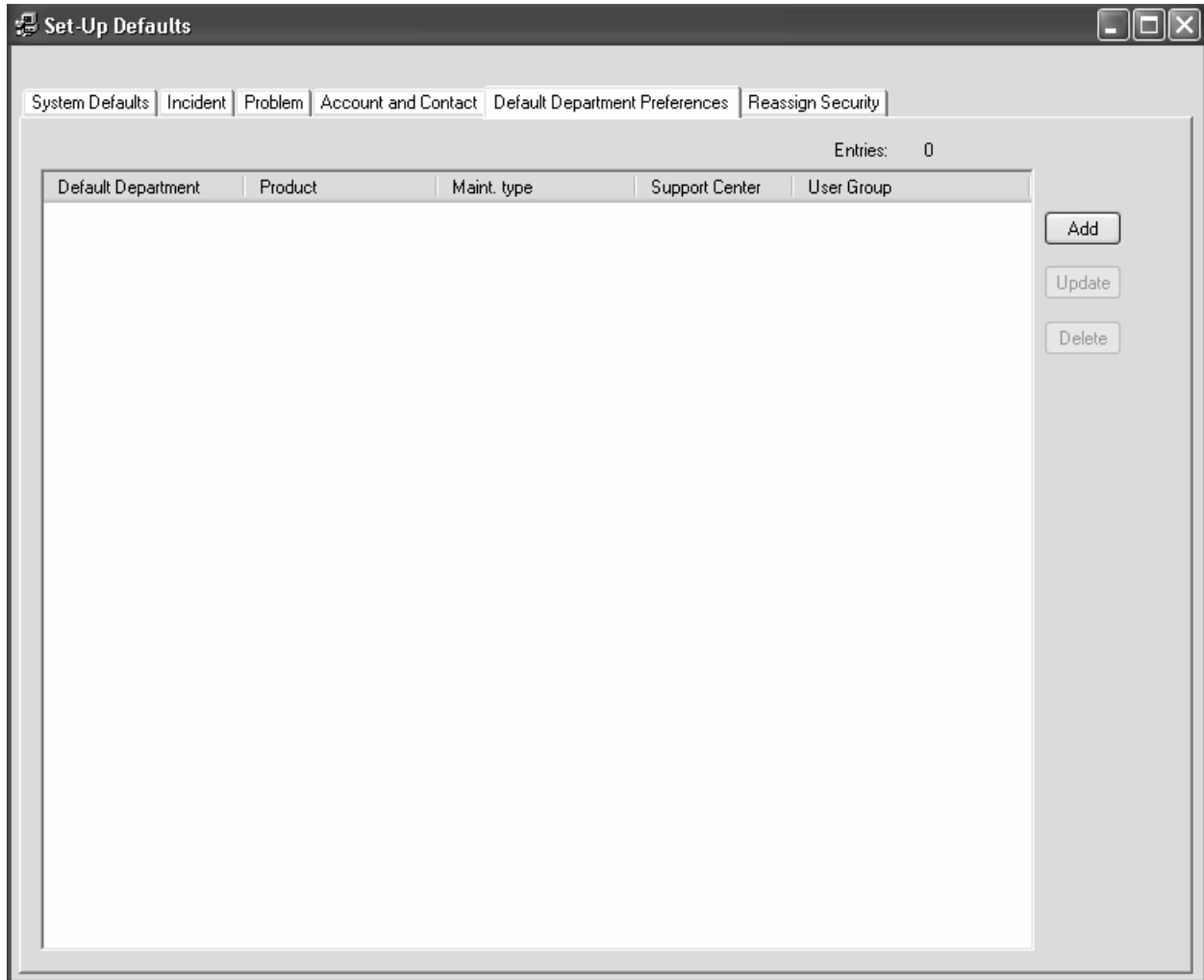
<u>Product</u>	<u>Maint. Type</u>	<u>Support Center</u>	<u>User Group</u>	<u>Default Department</u>
AP Manager	-	-	-	Account Support
AP Manager	Partner	-	-	Level 2 Support

With this data, an incident logged against the AP Manager product may go to one of two departments. The *User Group* and *Support Center* of the incident will not be a factor.

If the *Maintenance Type* of the incident is 'Partner', both records are candidates. The first record is a candidate because the product matches, and any maintenance type, even 'Partner', will be considered. However, the second record has two criteria that match, and thus the *Default Department* will be 'Level 2 Support'.

Though there is not a meaningful example of this, it is possible for several matches to be found with the same number of criteria, but in different columns. In this case, preference is given to the columns which had the match in this order: *Product*, *Maintenance Type*, *User Group*, and *Support Center*.

Panel Layout



Panel Elements

List Box

Displays the default department processing rules.

Entries

The number of default department processing rules that have been defined.

List Box Button Controls

Add

Displays the Default Department Information pop-up box to add a default department processing rule.

Update

Displays the Default Department Information pop-up box to update the selected processing rule. This button is grayed out if there are no entries in the Default Department list box.

Delete

Deletes the selected default department processing rule. This button is disabled if there are no entries in the Default Department list box.

Default Department Information Pop-Up Box

This pop-up box allows you to maintain default department processing rules.

Pop-Up Box Layout

Pop-Up Box Elements

User Group

(Def_Dept.Group_Pref_Id)

Identifies a specific group of users. This can be a location of an office or the name of a specific group within the company. The values for this field are defined using the Maintain Codes/Code Types panel.

For incidents entered through *WebFirst*, you must select one of the *WebFirst* user groups. This rule will apply to the *User Group* defined on the Account Information panel, or the Account Contact panel if the user logged in as a specific contact. If the *User Group* is blank for the account or contact, it is assumed that the *User Group* is the *WebFirst* user group added by RTI with Code Id 638.

Product

(Def_Dept.Product_Id)

A valid product name in CFS that will be used in conjunction with the product entered in the Product field on the incident.

Maintenance Type

(Def_Dept.Maint_Type_Id)

A valid maintenance type in CFS that will be used in conjunction with the maintenance contract selected on the incident.

Support Center

(Def_Dept.Support_Center_Id)

A sales (SALES) or support (CS) department that will be used in conjunction with the support center for the account selected on the incident.

Default Department

(Def_Dept.Department_Id)

The name of the department to which the incident will be assigned based upon the value selected in one or more of the previous fields.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the information.

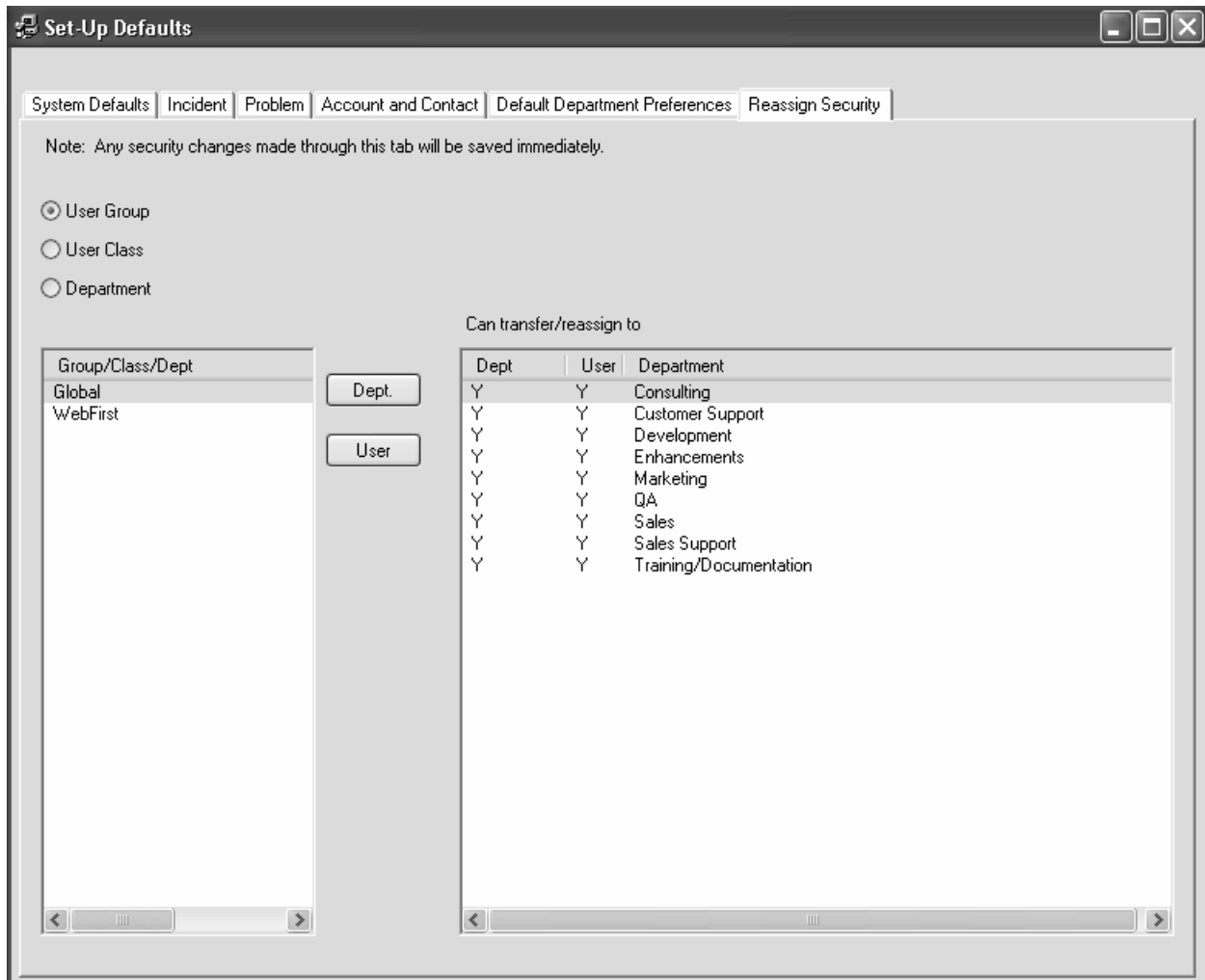
Cancel

Closes the pop-up box without saving any changes.

Reassign Security Tab

This tab allows you to identify which user groups, user classes, and/or departments can transfer or reassign objects to specific departments and/or users within the department.

Panel Layout



Panel Elements

User Group

If this radio button is selected, the Group/Class/Dept list box will display a list of all the active user groups.

User Class

If this radio button is selected, the Group/Class/Dept list box will display a list of all the active user classes.

Department

If this radio button is selected, the Group/Class/Dept list box will display a list of all the active departments.

Can transfer/reassign to list box

This list box displays a list of all active departments in the database. A 'Y' in the *Dept* column indicates that the selected group/class/department can transfer or reassign objects directly to the department. A 'Y' in the *User* column indicates that the selected group/class/department can transfer or reassign objects directly to individuals within the department.

Button Controls**Dept.**

If this button toggles the *Dept* column for the selected department in the 'Can transfer/reassign to' list box between Y and N.

User

If this button toggles the *User* column for the selected department in the 'Can transfer/reassign to' list box between Y and N.

User Group Preferences Panel

This panel is used to define options related to a specific user group. Initial values for each option are defined for the 'Global' user group and can be modified as necessary. When a new user group is added, the initial values for each option will default from the 'Global' user group.

You can set the user group options differently for each *WebFirst* user group you have defined. Initial values for each option default from the values defined for the 'Global' user group.

Each user of the system can be associated with a specific user group. If one is not defined for a user, the 'Global' user group is used.

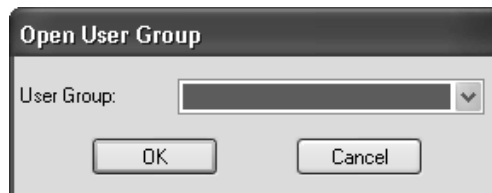
Access

To access this panel select *Administration* and *User Group Preferences* from the menu bar.

Open User Group Pop-Up Box

This pop-up box allows you to open the User Group Preferences panel for a specific user group.

Pop-Up Box Layout



Pop-Up Box Elements

User Group

Identifies the specific user group for which you want to open the User Group Preferences panel.

Pop-up Button Controls

OK

Displays the User Group Preferences panel for the selected *User Group*.

Cancel

Closes the pop-up box without displaying the User Group Preferences panel.

General Tab

This tab allows you to identify general options related to the selected *User Group*.

Panel Layout

User Group Preferences: Global

General | Incident/Problem | Sales | Activities/Time | WebFirst | Work Days | Menus/Toolbars

Default View

Default Panel at Login: Work Center

Default Navigator View: Accounts

System Options

FAX:

Limit attachment size to: KB

E-Mail

Default contact to recipient list: No

When Selecting Contacts

Show contacts for others with the same parent

Show parent and reseller contacts

Show personnel working at Account site

Show associated contacts

Other Selection

Exclude prospects and prospect contacts in CustomerFirst

Limit selection of participants to people within the current user's department.

Display Available Refreshes on Ship Product to Account Panel When it is Opened

Display all active refreshes

Display the latest refresh for Product/Version/Implementation

Display no refreshes

Panel Elements

Default Panel at Login

This determines if a default panel is displayed immediately following a successful login for users in the user group. The options in this drop down are: 'Work Center' and 'New Incident'. If 'Work Center' is selected, the Work Center panel is displayed when users log in. If 'New Incident' is selected, a new Incident panel is displayed when users log in. The value selected here can be overridden by an individual user on the User Setup panel. The system default value is 'Work Center'.

Default Navigator View

This identifies which tab of the Navigator should be displayed when the users log in. The value selected here can be overridden by an individual user on the User Setup panel. If specific users do not have access to a specific tab based on the panel security access, it will not appear for the user. The system default value is 'Account View'.

FAX

The type of fax interface to be used by the user group.

Limit attachment size to

You can specify a maximum size limit for attachments being added. If a user attempts to attach a file that exceeds this limit an error message is displayed.

Default contact to recipient list

Identifies whether the Contact from an incident, incident activity, contact activity, sales opportunity, or sales activity should be automatically added to the Recipient List on the Send E-Mail pop-up. The system default value is 'No'.

Show contacts for others with the same parent

If this option is selected, all contacts that have the same parent account will be displayed for selection in the *Contact* field on the Incident panel.

Show parent and reseller contacts

If this option is selected, all contacts for the account's parent and/or reseller account will be displayed for selection in the *Contact* field on the Incident panel.

Show personnel working at the account site

If this option is selected, any personnel on the Relationships & Notes tab of the Account Information panel for this account that have a Relationship Type where the Internal Value is 'CONSL' will be displayed in the *Contact* field.

Show associated contacts

If this option is selected, all contacts associated with the account will be displayed in the *Contact* field on the Incident panel.

Exclude accounts and account contacts in CustomerFirst

If checked, any account record that has a Sales_Status_Id of 'Not Visible in CFS' (NOCFS), will not be displayed in *CustomerFirst*. Additionally, if this checkbox is checked, the *Include Accounts* checkbox is enabled on the Find Account and Find Contact pop-up boxes. The system default is checked.

Limit selection of participants to people within the user's department

If checked, whenever a user tries to add a participant for an object, the *Participant Name* field will only include active personnel within the current user's department.

Display all active refreshes

If selected, when the Ship Product to Account panel is opened the Available Refreshes list box will automatically be populated with all active refreshes defined in the database. This is the system default.

Display the latest refresh for Product/Version/Implementation

If selected, when the Ship Product to Account panel is opened the Available Refreshes list box will automatically be populated with the latest refresh for each product/version/implementation combination defined in the database.

Display no refreshes

If selected, when the Ship Product to Account panel is opened the Available Refreshes list box will not be populated with any active refreshes defined in the database.

Incident/Problem Tab

This tab allows you to identify specific options related to incidents and problems for the selected *User Group*.

Panel Layout

User Group Preferences: Global

General Incident/Problem Sales Activities/Time WebFirst Work Days Menus/Toolbars

Incident Related Options

Allow New Incident as Operator Show Account ID on Incident panel

Do not require Contact on incident

Fill Product Refresh on Incident panel with: Software only Hardware Only Both

Notify user if product has been customized for the incident Account: Yes No

Default Char. Type 1: Default Char. Type 3:

Default Char. Type 2: Default Char. Type 4:

Require at least one characteristic before closing incident

Create history record for changes to incident Long Description

Move history to new problem when linking

Days closed incidents appear in Recent Incidents:

Problem Related Options

Create history record for changes to problem Long Description

Panel Elements

Allow New Incident as Operator

If this option is selected, a menu option of Operator Incident is displayed under the File/New menu. When an incident is opened in this manner the incident is handled as if it was opened by a user with an 'Operator' user class. The incident *Owner* is the value in the *Default Department* and the incident *Status* is 'Initial'.

Show Account ID on Incident panel

If this option is selected, the *Account ID* will be displayed on the Incident panel as a hyper text link. This hyper text link defaults to the Account Information panel for the account selected on the Incident.

Do not require Contact on Incident

If this option is selected, users are not required to enter a *Contact* for an incident.

Fill Product field in Incident panel with

Indicates what will be displayed in the *Full Refresh* field on the Incident panel. "Software" refers to products defined through Product Information, and "Hardware" refers to models defined through Equipment Information. The system default is 'Software'.

NOTE: The options of 'Hardware Only' and 'Both' will not appear if you do not have the Inventory Management module.

Notify user if product has been customized for the Incident account

If 'Yes' is selected, users will be notified when an incident is created for an account who has a customized version of the product selected on the Incident panel. This is determined based on the custom programs displayed on the Product Customizations tab of the Account Information panel. The system default is 'Yes'.

Default Char. Type 1-4

Allows you to define four characteristic types to be displayed on the Main tab of the Incident panel. The values associated with the *Characteristic Type* will appear in a drop down field next to the type.

Require at least one characteristic before closing incident

(User_Ins_Default.Char_Required)

This allows the user to specify whether a characteristic is required in order for an incident to be closed. If 'Yes' is selected, at least one characteristic must be applied to the incident before the incident can be closed. If 'No' is selected, an incident can be closed regardless of whether a characteristic has been applied to the incident. If you import a closed incident and have this option set to 'Yes' and no characteristic is found on the incident, then the import record is rejected.

Create history record for changes to incident Long Description

If this option is selected, when the incident *Long Description* is modified, an 'Adjust' history event will be created for the incident.

Move history to new problem when linking

If this option is selected, when an incident is linked to a different problem, the history from the original problem is moved to the new problem.

Days closed incidents appear in Recent Incidents

Indicates the number of days that a closed incident will appear on the Recent Incidents for Account or Contact panel. Do not enter value greater than 999.

Create history record for changes to problem Long Description

If this option is selected, when the problem *Long Description* is modified, an 'Adjust' history event will be created for the problem.

Sales Tab

This tab allows you to identify specific options related to sales opportunities for the selected *User Group*.

Panel Layout

User Group Preferences: Global

General | Incident/Problem | **Sales** | Activities/Time | WebFirst | Work Days | Menus/Toolbars

Sales Opportunities

Default Dept.:

Days closed sales opportunities appear in Recent Sales Opportunities:

Prompt to copy lead sources from Contact/Account when new Sales Opportunity is created.

All projection detail records for a sales opportunity must have the same Projected Close Date.

Sales Opportunity Ticklers

Default initial Tickler Date: days out.

Default Tickler Date for Sales Activity? Yes No days out

Panel Elements

Default Dept.

The name of the department to which Sales Opportunities will be assigned if they have not been entered by a user with a *User Class* that has an Internal Value of SALES.

Days closed sales opportunities appear in Recent Sales Opportunities

Indicates the number of days that a closed sales opportunity will appear on the Recent Sales Opportunities panel. Do not enter value greater than 999.

Prompt to copy lead sources from Contact/Account when new Sales Opportunity is created

If checked and a new Sales Opportunity is initially saved, the user will be prompted to add lead sources that are currently associated with the contact or account record.

All projection detail records for a sales opportunity must have the same Projected Close Date

If checked, the system will enforce that all projection detail records for a sales opportunity have the same *Projected Close Date*. If the user changes the date on one projection record for a sales opportunity, the date will be automatically changed for all other projection records for the sales opportunity.

Default initial Tickler Date

Indicates the number of days to be used from the *Date Opened* to determine the *Tickler Date* for the initial tickler. The system default value is '10'.

Default Tickler Date on Sales Activity?

Allows the user to select whether or not the tickler date will default when a user in the selected User Group is adding a sales opportunity activity. The system default is 'No'.

If 'Yes' is selected, the *days out* field is enabled. The user must enter a valid whole number to indicate the number of days from the current date that the sales activity tickler date will default.

If 'No' is selected, the *Tickler Date* on a sales activity will be blank.

days out

This field is only enabled if the user selects 'Yes' to the *Default Tickler Date for sales activities* field. A whole number must be entered to indicate the number of days from the current date that the sales activity tickler date will default. The calculation of the default date will be based on the Work Days defined for the user group.

Activities/Time Tab

This tab contains options related specifically to activities and time entry.

Panel Layout

The screenshot shows a window titled "User Group Preferences: Global" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains a tabbed interface with the following tabs: "General", "Incident/Problem", "Sales", "Activities/Time" (selected), "WebFirst", "Work Days", and "Menus/Toolbars".

Under the "Activities/Time" tab, there is a section titled "Activities" containing:

- A checked checkbox: Users can override Activity Date/Time
- A question: "Default Tickler Date on Contact Activity?" with radio buttons for "Yes" and "No" (selected), followed by a text input field and the text "days out".

Below the "Activities" section are two panels:

- Time Entry Options:**
 - Automatically calculate Total Time
 - Allow Billing Code without Other Time
 - Allow Other Time without Billing Code
- Time Entry Required:**
 - Time entry is required for incidents and related tasks
 - Time entry is required for Problems and related tasks

Panel Elements

Users can override Activity Date/Time

Indicates whether users can override the *Activity Date* and *Activity Time* fields when entering an incident, problem, or task activity. This will change the date/ time stamp on the history record to reflect what is entered rather than the current date and time. Override should be used when activities may be entered after they occurred, and it is important for you to know the actual date and time an action was taken. The system default is checked.

Default Tickler Date on Contact Activity?

Allows the user to select whether or not the *Tickler Date* will default when a user is adding a contact activity. The system default is 'No'.

If 'Yes' is selected, the *days out* field is enabled. The user must enter a valid whole number to indicate the number of days from the current date that the contact activity tickler date will default. The calculation of the default will be based on Work Days.

If 'No' is selected, the *Tickler Date* on a contact activity will be blank.

days out

This field is only enabled if the user selects 'Yes' to the *Default Tickler Date on Contact Activity* field. A whole number must be entered to indicate the number of days from the current date that the contact activity *Tickler Date* will default. The calculation of the default date will be based on the Work Days defined for the user group.

Time Entry Options

Allows you to define options related to the time entered on an incident, problem or task activity.

Automatically calculate Total Time

If this option is selected, the *Total Time* field on the Activity and Time Entry panels will be calculated by the system as the sum of the other time fields.

Allow Billing Code without Other Time

If this option is selected, a *Billing Code* can be entered on the Activity panel without any entry in the *Other Time* field. If this option is not selected, the user will be required to enter time in the *Other Time* field if a *Billing Code* is selected.

Allow Other Time without Billing Code

If this option is selected, *Other Time* can be entered on the Activity panel without selecting a *Billing Code*. If this option is not selected, the user will be required to select a *Billing Code* if *Other Time* is entered.

Time entry is required for incidents and related tasks

If this is set to 'Yes', the entry of a non-zero time value in at least one time field on the Incident Activity, Incident Time Entry, Task Activity, and Task Time Entry (for Incident Tasks) panels is required. If it is set to 'No', time is not required.

Time entry is required for problems and related tasks

If this is set to 'Yes', the entry of a non-zero time value in at least one time field on the Problem Activity, Problem Time Entry, Task Activity, and Task Time Entry (for Problem Tasks) panels is required. If it is set to 'No', time is not required.

WebFirst Tab

This tab contains options related specifically to the selected *WebFirst* user group. This tab is disabled if the selected user group does not have an Internal Value of WFS.

Panel Layout

User Group Preferences: WebFirst

General | Incident/Problem | Sales | Activities/Time | **WebFirst** | Work Days | Menus/Toolbars

WebFirst Login Message:

Start Date: End Date:

Default Display Panel:

Home Page:

URL for Online Help Topics page:

Restrict Product Access in WebFirst to

Shipped Licensed Maintenance Contract No Restrictions

Limit Incident Contact and Activity Contact to user logged in

User can only see incidents for which the user is the Contact on the incident

Do not allow new activities or attachments to be added for "closed" incident

Panel Elements

WebFirst Login Message

Allows you to define a message that should be displayed when a user logs into *WebFirst*.

Start Date

The message will not be displayed until this date.

End Date

The message will not be displayed after this date.

Default Display Panel

Identifies which panel should be displayed when a user logs into *WebFirst*.

Home Page

Identifies the Home Page that should be displayed when a user logs into *WebFirst*. This field needs to contain the name of the file to be used for the home page. The file must be located in the directory from which the *Appsvr.exe* is executed.

URL for Online Help Topics page

WebFirst provides introductory standard help files. Alternatively, you can define your own help documentation for your *WebFirst* accounts. Enter the URL where these help files are located in this field. An account can access the help files from the Help menu option or the Home panel.

Restrict Products in WebFirst to:

Used to identify which products and refreshes will be displayed for selection when a new incident is entered and when search criteria are defined. Also used to determine which problems will be returned in the Knowledge Base Search results. The following will occur regardless of the options defined for this field:

- If a product is marked as 'Inactive' in Product Information that product will never be displayed for selection in *WebFirst*.
- If a version is no longer supported based on a *Support End Date* in Product Information, the version and associated refreshes will never be displayed for selection in *WebFirst*.
- If a refresh is marked as 'Inactive' in Product Information that refresh will never be displayed for selection in *WebFirst*.

Shipped

The products displayed for selection for a new incident, and when Knowledge Base Search or Incident Search criteria are defined, will be filtered based on the active shipped products that are displayed on the Shipped Products & Temp Fixes tab of the Account Information panel. In addition, only problems that have the *Public* field checked, and with a *Base Product* that is an active shipped product for the account, will be displayed in the Knowledge Base Search results.

The *Full Refresh* field on the Incident Search panel will include active refreshes that are displayed on the Shipped Products & Temp Fixes tab of the Account Information panel.

If there are no active shipped products for the account, no products and refreshes will be displayed for selection in *WebFirst*. If the *Full Refresh* field is required on the Incident panel, the user will not be able to add a new incident.

Licensed

The products displayed for selection for a new incident, and when Knowledge Base Search or Incident Search criteria are defined, will be filtered based on the active license items for the licenses that are displayed on the Licenses tab of the Account Information panel. In addition, only problems that have the *Public* field checked, and with a *Base Product* that is an active licensed item for the account, will be displayed in the Knowledge Base Search results. A license item will be considered inactive if the license has expired or the license item is marked as 'Inactive'.

The *Full Refresh* field on the Incident Search panel will include active refreshes in Product Information for the active license items for the licenses that are displayed on the Licenses tab of the Account Information panel.

If there are no active licensed items for the account, no products and refreshes will be displayed for selection in *WebFirst*. If the *Full Refresh* field is required on the Incident panel, the user will not be able to add a new incident.

Maintenance Contract

The products displayed for selection for a new incident, and when Knowledge Base Search or Incident Search criteria are defined, will be filtered based on the covered products for the active contracts that are displayed on the Contracts tab of the Account Information panel. In addition, only problems that have the *Public* field checked, and with a *Base Product* that is a covered product for the account, will be displayed in the Knowledge Base Search results.

The *Full Refresh* field on the Incident Search panel will include active refreshes in Product Information for the covered products for active contracts that are displayed on the Contracts tab of the Account Information panel.

If there are no covered products for the account, no products and refreshes will be displayed for selection in *WebFirst*. If the *Full Refresh* field is required on the Incident panel, the user will not be able to add a new incident.

No Restrictions

All active products and refreshes defined in Product Information will be displayed for selection. The search results will not be filtered by product unless a product related field is selected as a search criterion by the account.

Limit Incident & Activity Contact to user logged in

If checked, the user logged in cannot select any other contact in the *Contact* field on a new incident or an incident activity.

User can only see incidents for which the user is the Contact on the incident

If checked, the user logged in can only access incidents for which the user is the *Contact* on the incident.

Do not allow new activities or attachments to be added for “closed” incidents

If checked, new activities and attachments cannot be added to a “closed” incident through *WebFirst*.

Work Days Tab

This tab allows you to specify the work days and hours as well as the holidays for the specific user group. These times and workdays are used in calculating escalation times. This tab is disabled if the selected *User Group* is a *WebFirst* (WFS) user group.

Panel Layout

The screenshot shows the 'User Group Preferences: Global' dialog box with the 'Work Days' tab selected. The dialog has a title bar with standard window controls. Below the title bar are several tabs: 'General', 'Incident/Problem', 'Sales', 'Activities/Time', 'WebFirst', 'Work Days', and 'Menus/Toolbars'. The 'Work Days' tab is active and contains the following elements:

- Support Hours:** Two text input fields. The first contains '08:00' and the second contains '17:00', with the word 'to' between them.
- Server Time is:** A text input field followed by the word 'hours' and a dropdown menu.
- Workdays:** A vertical list of days with checkboxes:
 - Monday:
 - Tuesday:
 - Wednesday:
 - Thursday:
 - Friday:
 - Saturday:
 - Sunday:
- Holidays:** A large empty rectangular area for listing holidays.
- Buttons:** An 'Add' button and a 'Delete' button are located to the right of the Workdays and Holidays sections.

Panel Elements

Support Hours

Used to specify the support start and end time. Valid values are in the range of 00:00 to 23:59. The time is defined in the local time where the user group is located.

Server Time is

Used to specify how many hours the server time is ahead or behind the local time where the user group is located. If the local time is the same as the server time, this field should be left blank.

Workdays

Used to specify which days of the week are work days. All work days for the user group should be checked.

Holidays

Used to list all of the holidays observed by this user group. Use the date edit control above the list box to specify a date then use the *Add* button to add it to the holiday list. If no holiday is defined for this user group, the holidays defined for the 'Global' user group are assumed. Holidays are not used when calculating *Elapsed Work Hours* and *Elapsed Work Days*.

Add button

Adds the date entered in the date edit control to the holiday list.

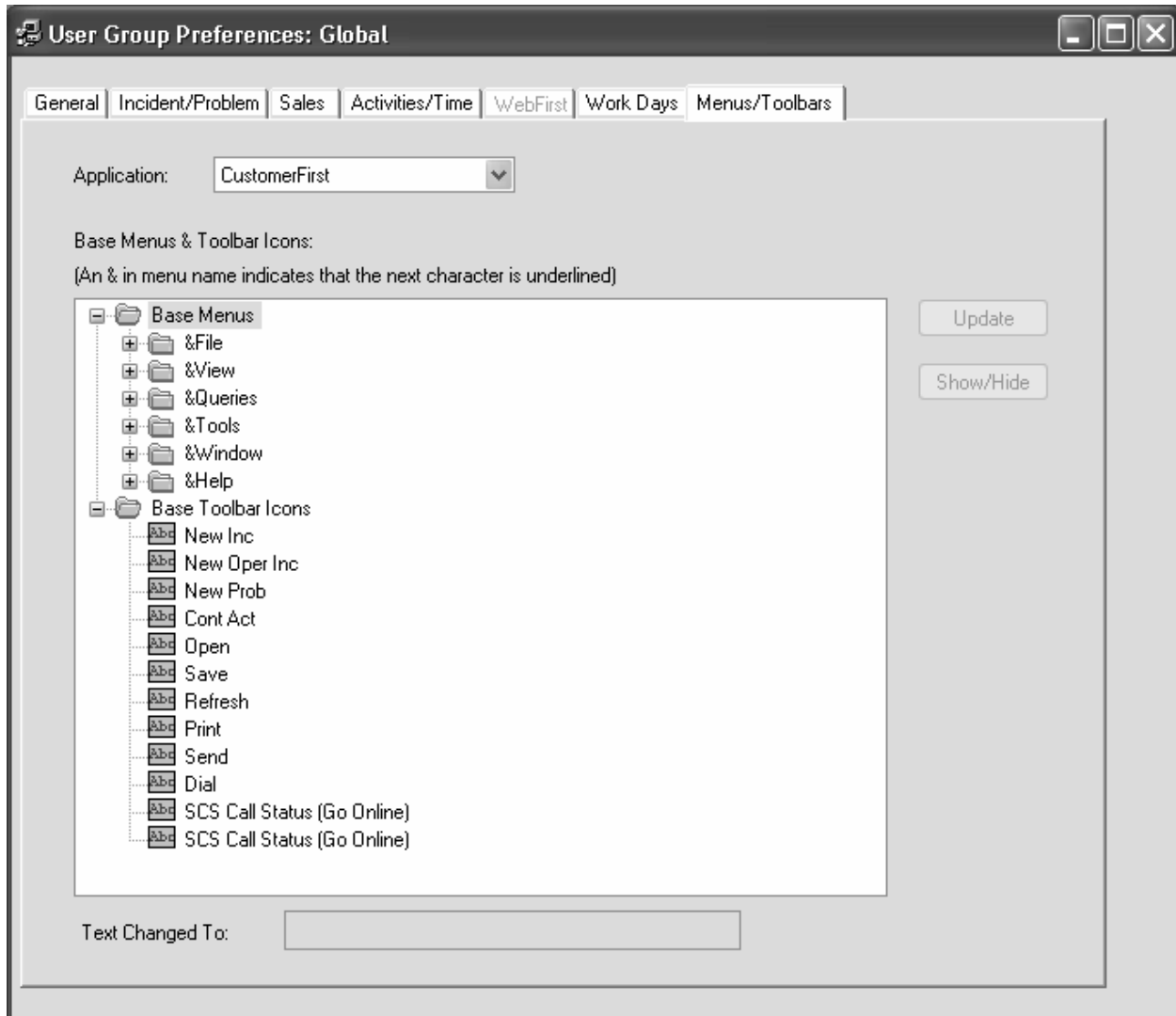
Delete button

Deletes the currently selected holiday from the list.

Menus/Toolbars Tab

The base menu options and tool bar icons on the left side of a panel are standard items that are typically always displayed regardless of what specific panel is active. If appropriate, these items can be renamed or hidden by user group.

Panel Layout



Panel Elements

Application

The name of the application for which you want to customize the menu options and tool bar icons. Valid values are *CustomerFirst*, *SalesFirst*, *System Administration*, and *WebFirst*.

Base Menus & Icons Tree

The center of the panel displays a tree structure of the base menus and tool bar icons for the selected *Application*.

Related Information

Based on which item is selected, related information is displayed.

Text Change To

This field displays the new name of the item that is selected in the tree structure.

Tree Button Controls**Update**

Displays the Change Menu Bar/Toolbar Icon Properties pop-up box to allow the user to either change the name or hide the selected base menu option or base tool bar icon.

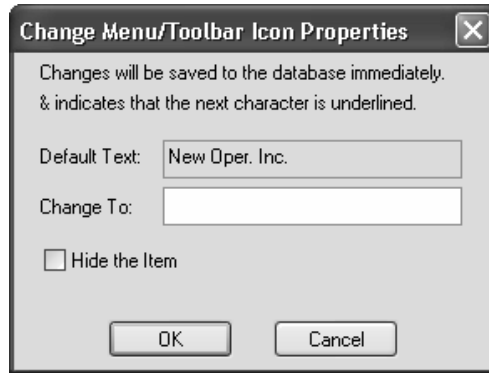
Show/Hide

Toggles the selected base menu or base tool bar icon between shown and hidden. If an item is hidden, (Hidden) appears next to the item.

Change Menu/Toolbar Icon Properties Pop-up Box

This pop-up box allows the user to change the name of a specific base menu option or base tool bar icon, or hide the item.

Pop-Up Box Layout



Pop-Up Box Elements

Default Text

The original name of the base menu option or base tool bar icon.

Change To

The new name of the base menu option or base tool bar icon.

Hide the Item

If this checkbox is checked, indicates that the base menu option or base tool bar icon should be hidden for users in the selected *User Group*.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

Cancel

Closes the pop-up box without saving any changes.

Configuring the Time Tracking Facilities

The system provides time recording facilities and can be configured to provide the flexibility needed for a wide variety of time tracking scenarios. You can track various types of time and you can integrate the time tracking with the contract facility.

Time can be entered for an incident, problem, and task. In addition, time can be entered for events such as training, vacation, or illness. These events are referred to as "Non-Chargeable Time". The person who expended the time is identified for each time entry.

The time tracking facilities provide the following capabilities:

- Record time
 - Record total time expended
 - Record the time associated with contracts
 - Record time to be billed to the account by invoice
 - Record absorbed time
 - Record other user defined time and non-chargeable time
- Ability to view the time expended for each incident, problem, and task.
- Ability to view the time expended for each person and department for any seven day period using the online time summaries.
- Database views which contain the information necessary to produce invoices, where applicable, from the time recorded.

Time Entry Format

Time may be entered as hours and minutes HHH:MM, or as fractional hours HHH.HH. Once entered it is immediately converted to its fractional equivalent. For example, if "1:30" is entered it is converted to "1.5". All time is displayed in fractional hours.

Timer Control

A timer control is available on the Incident, Problem, and Task Entry panels. It provides a way for the user to more easily track the amount of time they are spending on a particular issue.

Example of Tracking Employee Time

In this scenario, you are tracking the time expended by the employees for support and/or development activities. The Department and Individual Time Summary panels show the time expended by week and person. The source of these summaries is the Total Time fields on the activity. Although other time fields are available, Total Time is in many cases is the only field of interest.

To help automate the entry of this information, the timer control automatically counts time while new incidents are being logged. When the incident is first saved, the elapsed time is placed automatically

in the initial Incident History record. If the user continues to work on the incident the timer resumes counting, and places this in the *Total Time* field on the Incident Activity panel. If the user never goes to the activity panel they are eventually asked if they want to do so to log the remaining time.

When working on problems and tasks, the user should log time in the *Total Time* field on the Activity panels or start the timer up and let it count the time automatically. Again, if they do not go to the Activity panel the system will eventually ask them if they want to do so.

Anything placed in the *Total Time* field, whether by the system or manually by the user, flows through to the Department and Individual Time Summary panels.

Example of Tracking Billable Time and Employee Time

In this scenario, some or all of the Employee time is charged to accounts in addition to being reported on the Department and Individual Time Summary panels.

The Maintenance contract facility is a comprehensive way to identify by *Incident Type* (Product Defect, Question, Custom Mod, etc.) and *Payment Type* (Invoice, Credit Card) whether and how accounts will be charged for support services. Before we delve into this, we will discuss the general setup and some of the simpler ways to bill accounts.

Total Time will still be used to track employee time. However, this must be broken down into one or more additional categories so that it can be billed to an account. The first step is usually to make sure that the categorized time equals the *Total Time* that was entered. To select this option, check the *Automatically Calculate Total Time* option on the User Group Preferences panel.

If you only occasionally bill hourly time to your accounts, the Incident Activity screen provides a simple way to do this. If you enter time in the *Other Time* field and select the Billing Code of 'Invoice', the system will create special records in the database when the incident is closed. Third-party report writers can use the Need_Invoices view to show the time for a certain time period that is marked as Invoice time. See the View Definition section of the Data Definition manual for more information about the Need_Invoices view.

Example of Contracts and Billing

If the time expended by your personnel on incidents is typically billed to accounts, the maintenance contract facility allows you to automate this process. Instead of entering time in the *Other Time* field, you would create maintenance contracts for your accounts and enter all time in *Chargeable Time*. Depending on the options on the maintenance contract and its *Maintenance Type*, the system will create invoice records for the time entered.

In this scenario, to reduce the amount of data entry you may want to customize the timer control to place its time in *Chargeable Time*. This way, both *Chargeable Time* and *Total Time* are calculated automatically and in most situations the user may not have to explicitly enter time at all – the system will take care of this.

To implement this approach, start by creating one or more maintenance contract types. Contract types are used to define the attributes for a specific type of contract. Each type includes a maintenance class and other attributes that control the contract behavior. The contract types can apply to services provided, or product upgrades, or both. It identifies how time related to incidents or incidents are charged (i.e., Prepaid Incidents, Pay by Hours, etc). To bill an account, the *Maintenance Class* for the specific maintenance type is 'Pay by Hours' and the *Payment Type* is

'Invoice'. You have the ability to exclude certain incident types from being billed (for example, 'Product Defect').

Once this is done, a maintenance contract should be defined for each account who has maintenance. On a Maintenance contract you can enter the starting date and ending date and the covered products. When an incident is logged for a covered account and product, the system knows the time charges should be invoiced to the account and will create the invoice when the incident is closed records for any *Chargeable Time* that has been entered.

Just as before, the Need_Invoices view will show you the invoice charges for a time period. Also, the online system has an ad-hoc Maintenance Charges Search in addition to querying all the charges for a particular contract or for a particular contract renewal.

Time Tracking Setup

- Review the available time fields and determine which fields you are going to use.
- Identify if time entry should be required for incident or problems in Set-Up Defaults on the Incident Defaults and Problem Defaults tabs.
- Select the appropriate time entry options on the User Group Preferences panel.
- Select the appropriate options through screen customization for the *Timer Control*. Refer to the Timer Control Options topic in the Screen & List Box Customization section of the System Administration manual. The *Timer Control* for the incident, problem, and task panels must be customized separately.
- If appropriate, customize the time entry screens.
 - Incident Activity
 - Incident Time Entry (Update through History)
 - Problem Activity
 - Problem Time Entry (Update through History)
 - Task Activity
 - Task Time Entry (Update through History)
 - Non-Chargeable Time Entry

No Time Tracking

If you do not plan on using the system to track any time, you can customize the screens to remove any references to time entry.

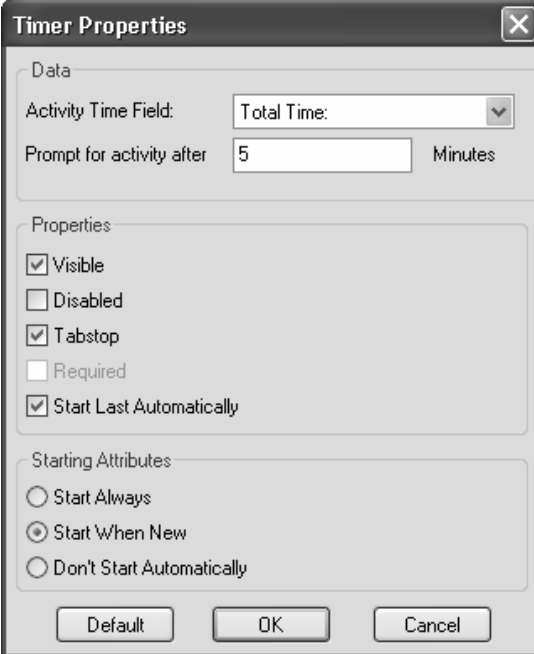
Timer Control Customization

Timer controls are used to keep track of the amount of time a user has spent on a specific panel. Timer controls are composed of an edit control and two buttons; the edit control displays the amount of time elapsed, the buttons allow the timer control to be activated/deactivated, and allow the user to activate/deactivate a timer control on another panel. All customization for a timer control on a particular panel is specific to the timer control residing on that panel.

Access

From the panel for which you want to customize the Timer Control, right click within the panel. Select *Change screen size/tabs* from the pop-up menu. Select the User Group. Double click on the Timer Control.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Timer Properties" with a close button (X) in the top right corner. The dialog is divided into three sections: "Data", "Properties", and "Starting Attributes".

- Data:** Contains "Activity Time Field:" with a dropdown menu set to "Total Time:", and "Prompt for activity after" with a text box containing "5" and the label "Minutes".
- Properties:** Contains a list of checkboxes: "Visible" (checked), "Disabled" (unchecked), "Tabstop" (checked), "Required" (unchecked), and "Start Last Automatically" (checked).
- Starting Attributes:** Contains three radio buttons: "Start Always" (unchecked), "Start When New" (selected), and "Don't Start Automatically" (unchecked).

At the bottom of the dialog are three buttons: "Default", "OK", and "Cancel".

Pop-Up Box Elements

Refer to the Timer Control Customization topic in the Screen & List Box Customization section of this manual.

Section 6

Accounts & Contacts

Section 6

Accounts & Contacts

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Administrative Account/Contact Maintenance

Several maintenance functions for accounts and contacts are intended to be controlled an administrative level. They include the following:

- Change an *Account Id*
- Merge an account with another account
- Reassign a contact to a different account
- Merge a contact with another contact

These functions should not be performed during normal working hours due to the number of records that are updated.

Note that *CustomerFirst* creates account and contact records for each department and person. Accounts and contacts that have been created from adding a department or personnel cannot be maintained by this utility.

Change Account ID

When you change the *Account ID* for an account, all occurrences in the database of the source *Account ID* will be changed to the target *Account ID*.

Merge Accounts

The following changes are made when you merge two accounts:

- The source account's name and all alias names for the account will be added to the target account's alias name list unless an identical alias name already exists for the target account. In the latter case the alias record for the source account is discarded. The *Active_Flag* of the alias record will be the same as the one for the target account.
- The source *Customer* and *Customer_CSM* records will be deleted from the *Customer* and *Customer_CSM* tables.
- Any account that has a *Parent Account* and/or *Reseller Account* that is the source account, will have their *Parent Account* and/or *Reseller Account*, changed to the target account.
- Any contact that is associated with the source account will have their association changed to the target account.
- All the contacts of the source account will be reassigned/merged to the target account. If a contact First and Last Name combination at the source account exists at the target account, the contact information is merged. (See the information below for information regarding merging contacts). If a contact First and Last Name combination at the source account does exist at the target account, the source account contact is reassigned to the target account. (See the information below for information regarding reassigning contacts).
- All contact history records (*Contact_History*) that contain the source *Customer_Id* will be changed to the target *Customer_Id*.

- All License_Item records having the Source Customer_Id will be changed to have the Target Customer_Id.
- All the products (Cust_Has_Product) of the source account will be transferred to the target account. If a Refresh_Id and Serial_Number combination already exists for the target account, the source record will be discarded.
- All the CPUs (Customer_CPU) along with their characteristics (CPU_Char) of the source account will be transferred to the target account. If an identical CPU Number already exists for the target account, the source record will be discarded along with its characteristics.
- The Customer_Id field in the source account's equipment records and equipment history records will be changed to the Customer_Id of the target account.
- All the customized programs (Cust_Program) for the source account will be transferred to the target account. If a program already exists for the target account, the source record will be discarded.
- All the account/personnel relationship records (Pers_Relation) of the source account will be transferred to the target account. If a Product_Id, Person_Id, and Rel_Type_Id combination exists for the target account, or if a primary relationship exists for a product and the target account, the source record will be discarded.
- All the account notes (RTI_Note) of the source account will be transferred to the target account.
- The Customer_Id field on the source account's incidents will be changed to the Customer_Id of the target account.
- The Customer_Id field on the source account's sales opportunities will be changed to the Customer_Id of the target account.
- The Customer_Id field on the source account's incidents will be changed to the Customer_Id of the target account.
- All escalation rules (Escalation_Rule) that refer to the source Customer_Id will be transferred to the target Customer_Id.
- All *WebFirst* login history records (WFS_Login_History) of the source Account will be transferred to the target account.
- When performing a merge, the target account data takes precedents over the source account information. Therefore if the target information is filled in and the source information is filled in, the target information will be used and the source information discarded. However, if the target account information is blank and the source account information is populated, the source account information will not be discarded but rather placed into the target account information. This applies only to data on the following tabs of the Account Information panel: Main, Details, and Misc.

Reassign A Contact

The following changes are made when you reassign a source contact and there is not already a contact with the same First and Last name for the target account:

- The Customer_Id of the selected source contact (Cust_Personnel) will be changed to the Customer Id of the target account.
- All the incident and incident history records that have a Contact_Id that is the same as the Contact Id of the selected contact, the Customer_Id will be changed from the source Customer_Id to the target Customer_Id.
- All the equipment and equipment history records that have a Contact_Id that is the same as the Contact Id of the source contact, the Customer_Id will be changed from the source Customer_Id to the target Customer_Id.
- All the sales opportunity and sales opportunity history records that have a Contact_Id that is the same as the Contact Id of the selected contact, the Customer_Id will be changed from the source Customer_Id to the target Customer_Id.
- For processing related to reassigning a source contact and there is a contact with the same First and Last name for the target account, refer to the Merge Contact topic below.

Merge Contacts

- If the source contact's Customer_Id (Cust_Personnel) is not the same as the target Customer_Id, it will be changed to the target Customer_Id.
- All associated account records (Associated_Cust) for the source Contact_Id will be changed to the target Contact_Id.
- All contact history records (Contact_History) that have the source Contact_Id will be changed to the target Contact_Id.
- All contact note records (RTI_Note) that have the source Contact_Id will be changed to the target Contact_Id.
- All product interest records (Product_Interest) that have the source Contact_Id will be changed to the target Contact_Id unless a record with the same Product_Int_Id and Contact_Type Id already exists for the target Contact_Id. In this case, the record for the source contact will be discarded.
- All lead source records (Contact_Source) that have the source Contact_Id will be changed to the target Contact_Id.
- For all the equipment and equipment history records that have the source Contact_Id, the Contact_Id will be changed to the target Contact_Id.
- All the incidents (Incident) for the source Contact_Id will be changed to the target Contact_Id.

- All the incident history records (Inc_History) that have a Phone_Contact_Id that is the same as the source Contact_Id, the Phone_Contact_Id will be changed to the target Contact_Id.
- All sales opportunities (Sales_Opportunity) for the source Contact_Id will be changed to the target Contact_Id.
- All sales opportunity history records (Sales_History) that have a Phone_Contact_Id that is the same as the source Contact_Id, the Phone_Contact_Id will be changed to the target Contact_Id.
- All collateral records (Lit_Fulfillment) that have the source Contact_Id will be changed to the target Contact_Id.
- All phase member records (Phase_Member) that have the source Contact_Id will be changed to the target Contact_Id.
- All group member records (Group_Member) that have the source Contact_Id will be changed to the target Contact_Id.
- All maintenance contract records (Maint_Contract and Contract_Contact) that have the source Contact_Id will be changed to the target Contact_Id.
- All license records (License) that have the source Contact_Id will be changed to the target Contact_Id.
- All escalation rule records (Escalation_Rule) that have the source Contact_Id will be changed to the target Contact_Id.
- When performing a merge, the target contact data takes precedents over the source contact information. Therefore if the target information is filled in and the source information is filled in, the target information will be used and the source information discarded. However, if the target contact information is blank and the source contact information is populated, the source contact information will not be discarded but rather placed into the target contact information. This applies only to non-address related data on the following tabs of the Contact panel: Main, Details, and Misc.

Log File

After the processing is finished, pertinent information about what has been processed will be written to a log file MaintCst.Log in the working directory.

Maintain Account Panel

From this panel you can do the following:

- Change an *Account Id*
- Merge an account with another account
- Reassign a contact to a different account
- Merge a contact with another contact

These functions should not be performed during normal working hours.

Note that *CustomerFirst* creates account and contact records for each department and person. Accounts and contacts that have been created from adding a department or personnel cannot be maintained by this utility..

Access

This panel is accessed from System Administration by selecting *Administration/* and *Account Related* and *Maintain Account*.

Menu Bar Choices

Maintain Account

Open Source Account
Open Source Contact
Open Target Account

Open Source Account

Displays the Account Information panel for the source Account specified.

Open Source Contact

Displays the Account Contact panel for the specified source contact.

Open Target Account

Displays the Account Information panel for the specified target account.

Panel Layout

The screenshot shows a window titled "Maintain Account" with a standard Windows-style title bar (minimize, maximize, close buttons). The window content is divided into two main sections: "Source Account/Contact" and "Target Account/Contact".

Source Account/Contact:

- Account: [Text Input] [Search Icon]
- Account ID: [Text Input]
- Contact: [Text Input] [Search Icon]

Target Account/Contact:

- Account: [Text Input] [Search Icon]
- Account ID: [Text Input]
- Contact: [Text Input] [Search Icon]

Below these sections, there are labels for "Current Task:" and "Processing:". At the bottom, there are four buttons arranged in a 2x2 grid:

- Merge Account
- Change Account ID
- Merge Contact
- Reassign Contact

Panel Elements

Account (Source) (Customer.Name)

When merging accounts, this is the name of the account that will be merged into the target account. This account will be removed from database after the merge. When reassigning or merging a contact, this is the name of the current account to which the contact belongs. It is not necessary to enter both the source account name and the source account Id.

Account ID (Source) (Customer.Customer_Id)

When merging accounts this is the Id of the account that will be merged into the target account. This account will be removed from database after the merge. When reassigning or merging a contact, this is the Id of the current account to which the contact belongs. It is not necessary to enter both the source account name and the source account Id.

Contact (Source) (Cust_Personnel.Contact_Id)

The name of the contact that you want to merge or reassign. This field is used only when reassigning and merging contacts.

Account (Target) (Customer.Name)

When merging accounts this is the name of the account into which the source account will be merged. When reassigning a contact, this is the name of the account to which the contact will be reassigned.

Account ID (Target) (Customer.Customer_Id)

When merging accounts this is the Id of the account which will remain after the merge operation. When reassigning a contact, this is the Id of the account to which the contact will be reassigned. When changing an account Id, it is the new Account Id.

Contact (Target) (Cust_Personnel.Contact_Id)

The name of the contact into which you want to merge the source contact. This field is used only when merging contacts.

Current Task

After processing has begun, this field shows the task that is being performed.

Processing

After processing has begun, this field shows the table that is currently being processed.

Button Controls**Merge Account**

Merges the source account with the target account and removes the source account from the database after the merge.

Change Account ID

Changes all instances of the *Account ID* in the database to the new *Account ID*. For example, all incidents, sales opportunities, licenses, and maintenance contracts will be modified.

Merge Contact

Merges the Source contact into the Target contact.

Reassign Contact

Reassigns the selected contact of the source account to the target account.

Section 5

Define Field Values

Section 5

Define Field Values

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Overview

There are many dropdown fields (those fields with a down arrow) used on panels and pop-up boxes throughout the system. The values that can be selected for these fields are defined in a number of different places depending on the specific field.

- Departments are defined from the Department List panel. Refer to the Departments & Personnel section in this manual.
- Countries are defined from the Country List panel which will be covered in this section.
- Account types are defined from the Account Types panel which will be covered in this section.
- Maintenance types are defined from the Maintenance Contract Types panel which will be covered in this section.
- Products and the related version, implementations and releases are defined from the Product List panel. Refer to the Products & Equipment section of the *CustomerFirst* Reference manual.
- Programs are defined from the Product Information panel. Refer to the Products and Equipment section of the *CustomerFirst* Reference manual.
- Characteristic types and values are defined from the Characteristic Type Set-up panel. Refer to the Incident Characteristics section in this manual.
- Lead sources are defined from the Sales Lead Source Information panel which will be covered in this section.
- The values for most other dropdown fields are defined from the Maintain Codes/Code Types panel which will be covered in this section.

Code Types and Code Values

Code types and values are used to enforce integrity and consistency across various fields in the system. A database field that is associated with a specific code type can only store values that come from the list of code values defined for that type. For example, the Incident_Status_Id field in the Incident table is associated with the Incident_Status_Id code type. The only valid entries for this field are those code values that belong to this code type. The code types and values are stored in the Codes table.

You can also define user level security and transition rules that can be used to further control how field values are entered into the system.

Refer to Appendix B in this manual for a description of each of the codes and information regarding modifications. The system comes installed with a set of valid code types, and code values for many of the code types.

Codes That Impact System Processing

Some code values are used by the system for specific processing. In most cases this is based on the *Internal Value* defined for a *Code Value*. However in some cases the system uses a specific *Code Id* which identifies a particular value. It is important that you are aware of which code types, code values, and internal values are related to specific system processing.

You should review the following list of code values before you add a new code value, or modify an existing value to make sure that you are aware of any processing implications.

<u>Field Name</u>	<u>Code Id/Internal Value</u>	<u>Impact</u>
Billing_Code_Id	ABS	Apply the <i>Other Time</i> as if it were <i>Absorbed Time</i> . This only applies to incident activities and task activities for tasks that are associated with an incident.
	CONTR	Apply the <i>Other Time</i> as if it were <i>Chargeable Time</i> . This only applies to incident activities and task activities for tasks that are associated with an incident.
	INV	Invoice the account for the time in <i>Other Time</i> field.
	OTHR	Apply the <i>Other Time</i> as if it were <i>Absorbed Time</i> .
Camp_Status_Id (Only with <i>SalesFirst</i>)	CLOS or UCLOS	Cannot add a new campaign phase or reopen an existing phase for this campaign.

Camp_Type_Id (Only with <i>SalesFirst</i>)	MKTG	If the Exclude from Mktg Campaigns checkbox on the Contact panel is checked, the contact will be excluded from the campaign.
Close_Reason_Id	IONLY	Used to exclude internally reported problems from the Problems Permanently Resolved By New Release (R0007) report.
Cust_Prod_Stat_Id	INACT	A product refresh with this Status will not appear in the <i>Full Refresh</i> drop down field on the Incident panel. It will also not appear on the Shipped Products and Temp Fixes tab of the Account panel unless the <i>Include Inactive Shipped Products</i> is checked.
Department_Type_Id	CS	All departments that have a department type with this Internal Value are included in the <i>Support Center</i> drop down field on the Account Information panel.
	SALES	All departments that have a Department Type with this Internal Value are displayed in the <i>Sales Region</i> and <i>Support Center</i> drop down fields on Account Information panel. By default, users in a department with this department type will appear in the <i>Salesperson</i> drop down field on the Account Information panel.
Equip_Status_Id (Only with Inventory Mgmt)	INTRN	Indicates the equipment is in transit. User is prompted to enter additional information. An RMA number can be entered if coming to company.
	INUSE	Indicates the equipment is installed at the account site. User is prompted to enter additional information. If you came from the Account Information panel or the Account Contact panel, the <i>Account/Dept</i> and <i>Contact/User</i> fields default to that account and contact.
	INV	Indicates the equipment is in inventory and can be used to replace similar equipment. User is prompted to enter additional information.

	OBS	Indicates the equipment is obsolete. User is prompted to enter additional information.
	PURCH	Indicates that a purchase request is being submitted. User prompted to enter additional information. The <i>Date Purchased</i> field defaults to the current date.
	RETRN	Indicates the equipment is being returned from repair. User is prompted to enter additional information. An RMA number is provided.
	RPAIR	Indicates equipment is being repaired. User is prompted to enter additional information. An RMA number is provided.
Inc_Activity_Id	781	When the <i>Send</i> button is used from the Resolution tab of the Incident panel, or the <i>Send to Contact(s)</i> button from the Main tab of the Temporary Fix panel or the Incidents tab of the Problem panel, an incident activity is automatically created. This activity type (E-Mail Out) will be used based on this Code ID.
	818	When the <i>Send to Participant(s)</i> button is used from the Participants and Task List tab of the Incident panel, an incident activity is automatically created. This activity type (E-Mail Internal) will be used based on this Code ID.
	1480	When an attachment is added directly from the Attachments box on the Incident panel, an activity is created automatically. This activity type (Attachment) will be used based on this Code ID.
	CALL	On the Incident Activity pop-up box, the <i>Activity Contact</i> field defaults to the Contact of the incident. If the incident <i>Status</i> is 'Initial' (INIT), the <i>Status</i> will be automatically changed to 'Active' (ACTV). Used to calculate the <i>Callback Hours</i> field and the initial response for the Incident Response Summary Report (R0010) for

		incidents opened by a user with a User Class of 'Operator' (OPER), or entered through <i>WebFirst</i> or the Incoming Mail Server.
	MESSG	Turns on the <i>Notify Owner</i> flag for the incident to notify the incident owner that something has happened related to the incident and they should review the history.
	RCDOC	If the incident and/or problem has a <i>Status</i> with an Internal Type of ADOC, the <i>Status</i> of the incident and/or problem is automatically changed to 'Active' (ACTV).
	QUEUE	If the incident <i>Status</i> is a waiting status with an Internal Type of ARES, AVER, ADOC, ATASK, or UWAIT, the incident will be temporarily removed from the owner's work items again for the designated number of Wait Days.
Incident_Status_Id	INIT	Initial <i>Status</i> of a new incident opened by a user with a User Class of 'Operator' (OPER), or created from the Incoming Mail Server or <i>WebFirst</i> . Initial response time is only calculated for incidents that are opened with this status.
	ACTV	Initial <i>Status</i> of a new incident opened by a user with any <i>User Class</i> except for 'Operator' (OPER). Initial response time is considered immediate.
	ARES	Incident <i>Status</i> is automatically changed to this if the problem is reassigned from the incident. In conjunction with Wait Days defined on the Set-up Defaults panel it may remove the incident from the Owner's work items.
	AVER	When an incident is set to 'Waiting Verification' (AVER) <i>Status</i> and the incident has a temporary fix, then the <i>Fix Ship Date</i> is filled in automatically with the current date. In conjunction with Wait Days defined on the Set-up Defaults panel it may remove the incident from the Owner's work items.
	ATASK	Indicates that there are tasks associated with this incident and that you are waiting for them to be completed.

When the tasks are closed, the *Status* of the incident will automatically be changed to 'Active' (ACTV). In conjunction with Wait Days defined on the Set-up Defaults panel it may remove the incident from the Owner's work items.

AFIX	Indicates that a temporary fix is required and should be developed by the problem Assignee. This incident <i>Status</i> is automatically set if the <i>Temporary Fix Req'd</i> flag is set on the problem and the problem <i>Status</i> is changed to 'Resolved' (RESV). In conjunction with Wait Days defined in Set-up Defaults it may remove the incident from the Owner's work items.
CLOS or UCLOS	Cannot modify the <i>Full Refresh</i> if there is a contract associated with the incident.
TFIX	Indicates that a temporary fix is required and should be developed by the incident owner. This incident <i>Status</i> is automatically set if the <i>Temporary Fix Req'd</i> flag is set on the problem and the problem <i>Status</i> is closed.

Restrictions: Only statuses with internal types of UOPEN, UWAIT and UCLOS can be added for Incident_Status_Id.

Maint_Class_Id	NLEXP	No limit for maintenance contract.
	PPTIM	Prepaid time maintenance contract.
	PPINC	Prepaid incident maintenance contract.
	PBTIM	Pay by time maintenance contract.
	PBINC	Pay by incident maintenance contract.
MC_Renew_Stat_Id	PEND	A maintenance renewal with this status will not be considered a valid renewal.
	INV	A maintenance renewal with this status will not be considered a valid renewal.
Outcome_Id	NEG	Indicates a negative response from a member of a campaign phase if the activity is entered from the campaign phase.

	POS	Indicates a positive response from a member of a campaign phase if the activity is entered from the campaign phase.
	UNDEL	Indicates the message or materials could not be delivered to a member of a campaign phase if the activity is entered from the campaign phase.
Perm_Fix_Status_Id	INCPA	Fix for this product/version/impl will be included in the next 'alpha' build.
	INCPB	Fix for this product/version/impl will be included in the next 'beta' build. If there is a new 'alpha' build prior to the next 'beta' build, fix will initially be included in that build.
	INCRP	Fix for this product/version/impl will be included in the next 'general' build. If there is a new 'beta' or 'alpha' build prior to the next 'general' build, the fix will be initially be included in that build.
	NOTRQ	Fix for this product/version/impl will not be included in any release build.
	NOTFX	Fix for this product/version/impl will not be included in any release build.
Phase_Status_Id (Only with <i>SalesFirst</i>)	CLOS or UCLOS	All phase members will be locked. The <i>Add</i> and <i>Delete</i> buttons in the Associated Groups group box will be disabled. New tasks cannot be added to a closed phase.
	INIT	Can only delete a phase if it is in a planned <i>Status</i> .
Phase_Type_Id (Only with <i>SalesFirst</i>)	EMAIL	If the <i>Exclude from E-Mailings</i> checkbox is checked on the Contact panel the contact will be excluded from this type of campaign phase.
	PMAIL	If the <i>Exclude from Postal Mailings</i> checkbox is checked on the Contact panel the contact will be excluded from this type of campaign phase.
	PHONE	If the <i>Exclude from Phone</i> checkbox is checked on the Contact panel the contact

		will be excluded from this type of campaign phase.
	FAX	If the <i>Exclude from Fax</i> checkbox is checked on the Contact panel the contact will be excluded from this type of campaign phase.
Prb_Activity_Id	802	When the <i>Send to Assignee(s)</i> button is used from the Associated Problems tab, or the <i>Send to Participant(s)</i> button is used on the Participants and Task List tab, or the <i>Send to Owner(s)</i> button is used from the Incidents tab of the Problem panel, a problem activity is automatically created. This activity type (E-Mail Internal) will be used based on this Code ID.
	797	When an attachment is added directly from the Attachments box on the Problem panel, an activity is created automatically. This activity type (Attachment) will be used based on the Code ID.
	QUEUE	If the problem <i>Status</i> has an internal value of ADOC, ATASK, WAIT, or UWAIT, the problem will be temporarily removed from the assignee s work items again for the designated number of Wait Days.
Priority_Id	MED	If an incident is created through the Incoming Mail Server without a <i>Priority</i> , this priority value is used.
Problem_Status_Id	ACTV	Initial default <i>Status</i> for a newly created problem.
	ADOC	Indicates that additional documentation is required. Automatically generates a 'Get Documentation' (GDOC) incident activity on the related incidents with the Comments to indicate to the incident owner(s) what information is required. This will automatically turn on the <i>Notify Owner</i> flag for all incidents linked to the problem.
	ATASK	Indicates that there are tasks associated with this problem and that the problem assignee is waiting for them to be

completed. When the tasks are closed, the *Status* of the problem will automatically be changed to 'Active' (ACTV).

RESV Indicates that the problem is understood but work is still required from the problem Assignee. If used when the *Temp Fix Req'd* flag has been turned on, this indicates that the problem Assignee will develop a temporary fix for the problem and the status of all linked incidents will be changed to 'ATempFix' (AFIX) If the *Temp Fix Req'd* flag is not set, the Status of the incidents will be changed to 'Respond' (RESP).

CLOS If the *Temp Fix Req'd* flag is not set, the *Status* of the associated incidents is changed to 'Respond' (RESP). If the *Temp Fix Req'd* flag is turned on, the *Status* of the associated incidents will be changed to 'TFixReq'd' (TFIX), indicating that the incident owner(s) are responsible for developing a temporary fix. The associated incident owners are sent an e-mail.

Restrictions: Only statuses with internal types of UOPEN, UWAIT and UCLOS can be added for Problem_Status_Id.

Problem_Type_Id

QUEST Used to represent requests or issues when the problem will not be reassigned. When an incident with this problem type is closed, and the *Owner* and *Assignee* are the same, the problem will be closed automatically with the same *Close Reason* and *Close Description* as the incident.

DCERR Used to represent documentation Issues. If this type is selected and no documentation references were entered, a warning message is displayed indicating that documentation references have yet to be added.

SFTWR Used to represent product related defects. For this problem type, the *Severity* field is required on the Incident panel.

Restrictions: Problem types that are NOT one of the following internal types will be categorized as "other" for reporting purposes: SFTWR, QUEST, ENHRQ, or DCERR.

Ref_Category_Id	A	Indicates that this refresh is an 'alpha' build. Used in conjunction with the Perm_Fix_Status_Id to identify which fixes are included in this build.
	B	Indicates that this refresh is a 'beta' build. Used in conjunction with the Perm_Fix_Status_Id to identify which fixes are included in this build.
	G	Indicates that this refresh is a 'general' build. Used in conjunction with the Perm_Fix_Status_Id to identify which fixes are included in this build.
Relation_Type_Id	CONSL	If a person from your company is added to the Relationships & Notes tab of the Account Information panel with a Relation_Type_Id that has an Internal Value of 'Consultant' (CONSL) then this person can be selected as a Contact on an incident for the account. In order for this function to be available, select the <i>Show personnel working at account site</i> option on the User Group Preferences panel.
	SALEC	Indicates that this relation type was created from the <i>Support Center</i> field on the Account Information panel. This relationship cannot be updated from the Relationships tab.
	SALEP	Indicates that this relation type was created from the <i>Salesperson</i> field on the Account Information panel. This relation will be included on the My Accounts tab in the Work center panel if <i>Relationship with Account</i> is selected. This relationship cannot be updated from the Relationships tab.
	SALER	Indicates that this relation type was created from the <i>Sales Region</i> field on the Account Information panel. This relationship cannot be updated from the Relationships tab.
Response_Id (Only with <i>SalesFirst</i>)	NEG	Used to identify a negative response from the member of a campaign phase.

	POS	Used to identify a positive response from the member of a campaign phase.
Sales_Stage_Id (Only with <i>SalesFirst</i>)	CANCL	Indicates the projection detail record and/or sales opportunity is closed and was not pursued. These projections will not be included in the sales forecasts.
	LOST	Indicates the projection detail record and/or sales opportunity is closed and was not successful.
	WON	Indicates the projection detail record and/or sales opportunity is closed and was successful.
Sales_Status	NOCFS	Indicates that the account is not visible in <i>CustomerFirst</i> if an option is set up in User Group Preferences.
SIs_Activity_Id	799	When an attachment is added directly from the Attachments box on the Sales Opportunity panel, an activity is created automatically. This activity type (Attachment) will be used based on this Code ID.
	CALL	Indicates that this activity should be included in the Sales People Calls query.
	_MAIL	Indicates that the activity was an incoming e-mail. It is used by the system for an activity that is entered through the Incoming Mail Server.
Task_Activity_Id	826	When the <i>Send to Participant(s)</i> button is used from the Participants and Task List tab of the Task panel, a task activity is automatically created. This activity type (E-Mail Internal) will be used based on this Code ID.
	798	When an attachment is added directly from the Attachments box on the Task panel, an activity is created automatically. This activity type (Attachment) will be used based on this Code ID.
Task_Status_Id	INIT	A task can only be deleted if it is in this

Status. No activities with time can be entered for a task in this status.

Restrictions: Only statuses with internal types of UNIT, UOPEN, UWAIT and UCLOS can be added for Task_Status_Id.

User_Cls_Name_Id	SUPRT	Used to indicate that users with this user class will typically be logging incidents reported by accounts. If an incident is opened by a user with any <i>User Class</i> other than SUPRT and OPER, the account will default to their department and the contact field will default to their name.
	OPER	Used to classify non-support personnel who will be logging incidents from accounts. These incidents are issues that should be responded to by a support person. Incidents opened by a person with this user class will have a default status of 'Initial' (INIT) and the <i>Owner</i> of the incident will default to the default department.
User_Group_Id	GUG	Indicates that this is the 'Global' user group. This should be the group with the most access.
	WFS	The user group used to customize <i>WebFirst</i> .

Maintain Codes/Code Types Panel

This panel is used to update existing code types and to add or update code values that are used to populate many of the drop down lists.

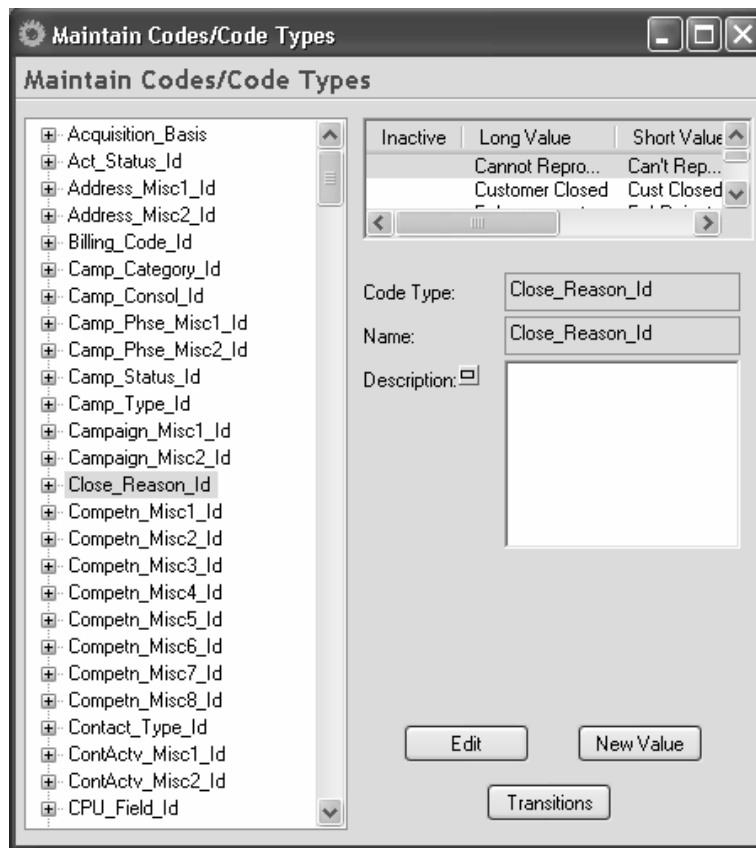
You can also define user level security and transition rules that can be used to further control how field values are entered into the system.

Access

To access this panel select *Administration* and *Maintain Codes/Code Types* from the menu bar.

Panel Layout (Code Type View)

This is the layout when a *Code Type* is selected in the list on the left side of the panel.



Panel Elements

Code Type/Value Tree

This tree displays a hierarchical list of the code types and values defined in the system that can be accessed by a user. System defined code types that are not accessible by a user are not displayed on this panel.

Code Value list box

This field contains a listing of all the code values associated with the selected *Code Type*. This list box and the code type/value tree are synchronized.

Individual Fields

Refer to the Edit Code Type pop-up for specific field descriptions.

Button Controls**Edit**

Displays the Edit Code Type pop-up box that is used to edit the selected *Code Type*.

New Value

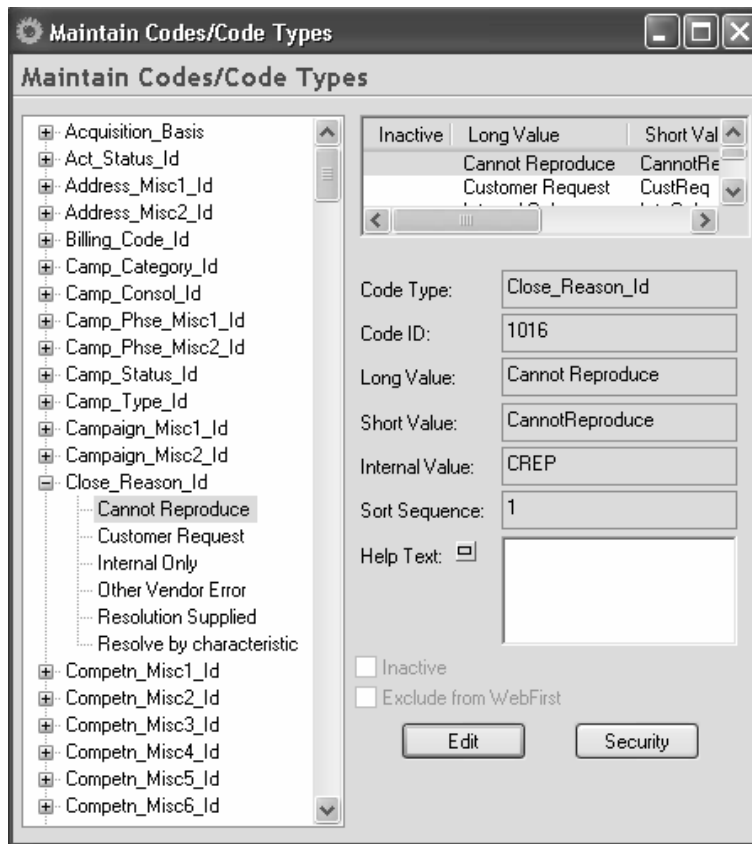
Displays the Edit Code Value pop-up box that is used to enter a new code value for the selected *Code Type*.

Transitions

Displays the Code Value Transitions pop-up box that is used to define transition rules for code values with the selected *Code Type*.

Panel Layout (Code Value View)

This is the layout when a *Code Value* is selected in the list on the left side of the panel.



Panel Elements

Individual Fields

Refer to the Edit Code Value pop-up for specific field descriptions.

Button Controls

Edit

Displays the Edit Code Value pop-up that is used to edit the selected code value.

Security

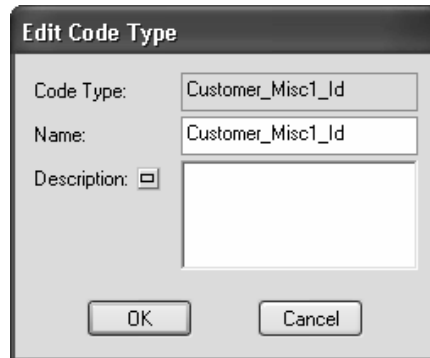
Displays the Code Value Security pop-up box that is used to define security rules for the selected code value.

Edit Code Type Pop-Up Box

This pop-up box is used to edit the name of a specific code type or provide a user defined description.

You can identify a single label for a field to be used on all screens and list boxes. Refer to the Screen & List Box Customization section of this manual for additional information.

Pop-Up Box Layout



Pop-Up Box Elements

Code Type (Code_Type.Field_Name)
This identifies the internal name for code type.

Name (Code_Type.Name)
This is the user defined name for the Code Type. If you modify the field label from the Maintain Table and Column Information panel, this name will also be modified. You can also modify the name from this pop-up.

Description (Code_Type.Description)
This provides a user defined description of the code type.

Pop-up Button Controls

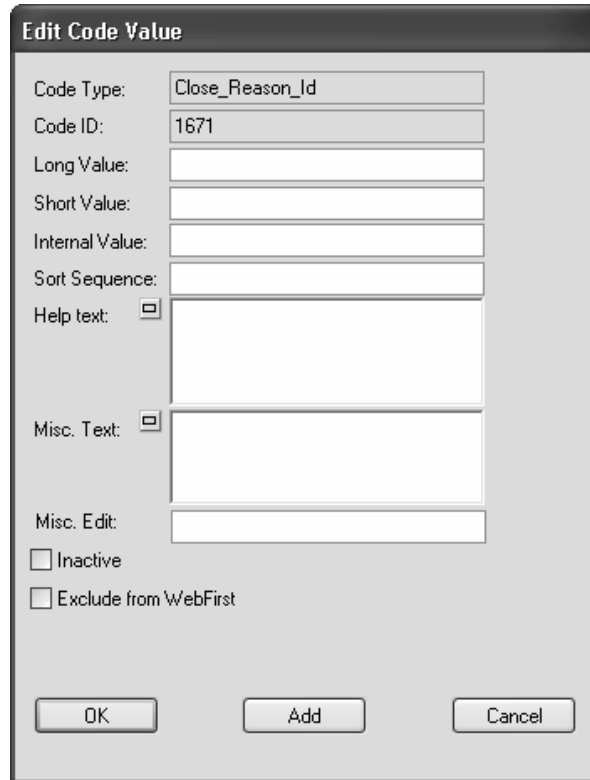
OK
Saves the current changes and closes the pop-up box.

Cancel
Closes the pop-up box without saving the current changes.

Edit Code Value Pop-Up Box

This pop-up box is used to add a new code value and an edit existing code value for a specific code type. For some code types additional fields will be displayed on this pop-up.

Pop-Up Box Layout



Pop-Up Box Elements

Standard Fields

Code ID (Codes.Code_Id)

The unique code identifier for the selected code value.

Long Value (Codes.Long_Value)

The long value (name) associated with the selected code value. This is 40 characters.

Short Value (Codes.Short_Value)

The short value (name) associated with the selected code value. This is 15 characters.

Internal Value (Codes.Internal_Type)

The internal type associated with the selected code value. This field is often used for internal system processing. Refer to the Codes That Impact System Processing topic for more information. For some specific code values, the Internal Value associated with a code cannot be changed. However, the long and short values for any code value can be modified.

Sort Sequence (Codes.Sort Sequence)

The sort sequence for the selected Code Value. This sort order is used when populating the associated drop down lists for this field. This value also determines the order of search results when a coded field value is used as a sort field. Code values of a given code type are ordered using the sort sequence first, and alphabetically second.

Help Text (Codes.Help_Text)

The help text associated with the selected code value. The help text for the code values associated with a particular field in the system can be accessed by right clicking on the drop down field.

Inactive (Codes.Inactive)

Indicates that the selected code value is no longer active. Inactive code values will not appear in the associated drop down lists for selection. However, existing records that contain inactive code values will still display these values.

Exclude from WebFirst (Codes.WebFirst_Exclude)

Indicates that the particular code value will not be accessible for any account through *WebFirst*.

Misc. Text (Codes.Misc)

This is a miscellaneous text field that allows you to add additional information about the code value.

Misc. Edit (Codes.Misc1)

This is a miscellaneous edit field that allows you to add additional information about the code value.

Code Type Specific Fields**Daylight Saving Time Applies** (Codes.DST_Applies)

This only applies to Time_Zone_Id. If checked, indicates that the time zone identified is subject to daylight savings time (DST).

Time Zone Offset (Codes.Time_Zone_Offset)

This only applies to Time_Zone_Id. Indicates the time difference between this time zone and the Greenwich Mean Time (GMT).

Include as Contact Role on Sales Opportunities (Codes.SLS_Role_Include)

This only applies to the Contact_Type_Id. Indicates whether the value will be available from the Contacts/Roles for Sales Opportunity on the Sales Opportunity panel. The default value for this field is checked.

Projected Percentage (Codes.Stg_Proj_Percent)

This only applies to the Sales_Stage_Id. Identifies the percentage that should be used to calculate the projected revenue based on the specific sales stage value.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Add

Only available if the user is adding a new code value. Saves the new code value and clears the pop-up box in order for the user to add another new code value.

Cancel

Closes the pop-up box without saving the current changes.

Value Security Pop-Up Box

You can control which code values users can select in a drop down field. Since different functional groups use certain objects (incidents, problems, tasks, etc.) in different ways, you may have values in certain drop down fields that do not apply to all users. For example, the Professional Services department may be using an *Incident Type (Problem Type)* to identify an incident for a new product implementation at a customer site. The Development and QA departments will not use this value. By using the code value security, you can ensure that specific values are only displayed for selection for the department that uses them. By default, code values are available for all users.

Code value access can be set by *User Class*, *User Group*, or *Department*. You can provide the following access for a specific code value:

- Entry and Query access
- Only Query access
- No access

Typically you should try to use a single user category for a specific code value. If you use more than one category you must be careful not to overlap the access rights you define.

In addition, you can control access to accounts based on specific values of the account *Sales Status*, and you can control access to incidents and problems based on specific values of the *Problem Type*.

Code value security changes will not be effective for current users until they log out of the system and log back in.

Pop-Up Box Layout

Note: All security changes are saved immediately.

User Group Value:
 User Class
 Department

Group/Class/Dept	Entry	Query	Can See Object
Global	Y	Y	Y
WebFirst	Y	Y	Y
WebFirst2	Y	Y	Y

Pop-Up Box Elements

User Group

If this radio button is selected, the active user groups defined in the system will be displayed in the list box. Security can then be set for each user group.

User Class

If this radio button is selected, the active user classes defined in the system will be displayed in the list box. Security can then be set for each user class.

Department

If this radio button is selected, the active departments defined in the system will be displayed in the list box. Security can then be set for each department.

Value

Identifies the code value for which the security access is being modified.

List Box

Displays the specific security that has been defined.

List Box Button Controls

Entry

Used to indicate whether the users can select the specific value in dropdown lists for entry purposes. The button toggles the value entered in the list box. 'Y' is yes and 'N' is no.

Query

Used to indicate whether the users can select the specific value in dropdown lists for query purposes such as the ad-hoc searches. The button toggles the value entered in the list box. 'Y' is yes and 'N' is no.

Can See Object

Used to indicate whether the users can access the related object. This is only available for the *Sales_Status_Id* and the *Problem_Type_Id* code types. The button toggles the value entered in the list box. 'Y' is yes and 'N' is no. For example, if a specific *Problem Type* is the code value, and there is an 'N' in this column, the users would not be able to see incidents or problems with this *Problem Type*.

Pop-up Button Controls

Exit

Closes the pop-up box.

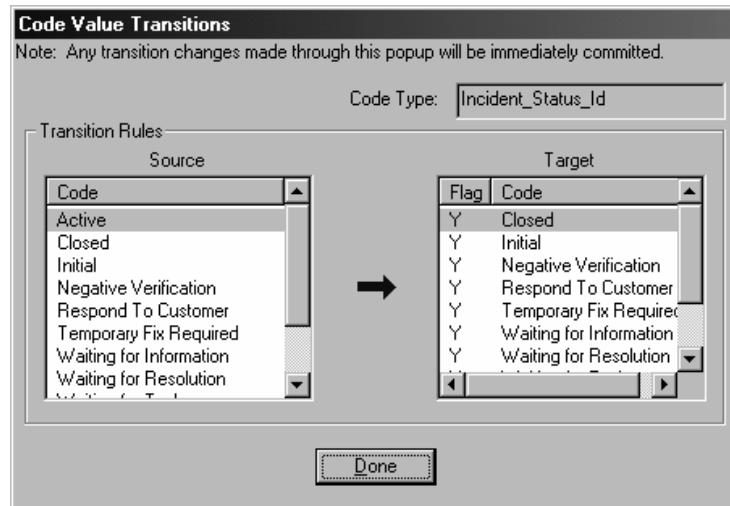
Code Value Transitions Pop-Up Box

Transition rules can be defined to prohibit users from changing a field from one code value to another code value. For example, this may be useful if you have a very specific workflow and an object must always move from one particular Status to another. It is important to note that the transitions defined for a particular code value will always be used.

By default, all transitions are allowed. Changes made to the transition rules are updated in the database immediately. A user who is logged into the system will be immediately impacted by the change. Transition rules only apply to users; the system will ignore any transition rules when performing its own internal processing.

You can allow and disallow transitions by double-clicking on the entry in the Target list box to toggle the transition *Flag*. In the following example, the incident status of "Active" can be changed to any other incident status value.

Pop-Up Box Layout



Pop-Up Box Elements

Code Type

The field for which transitions are being defined.

Source

The Source list box contains all of the code values defined for the selected code type.

Target

The Target list box shows the set of possible target code values and a flag indicating whether or not a transition is allowed between the selected entry in the Source list box and the values in the Target list box. The Target list box will synchronize itself with the currently selected value in the Source list box.

Pop-up Button Controls

Done

Closes the pop-up box.

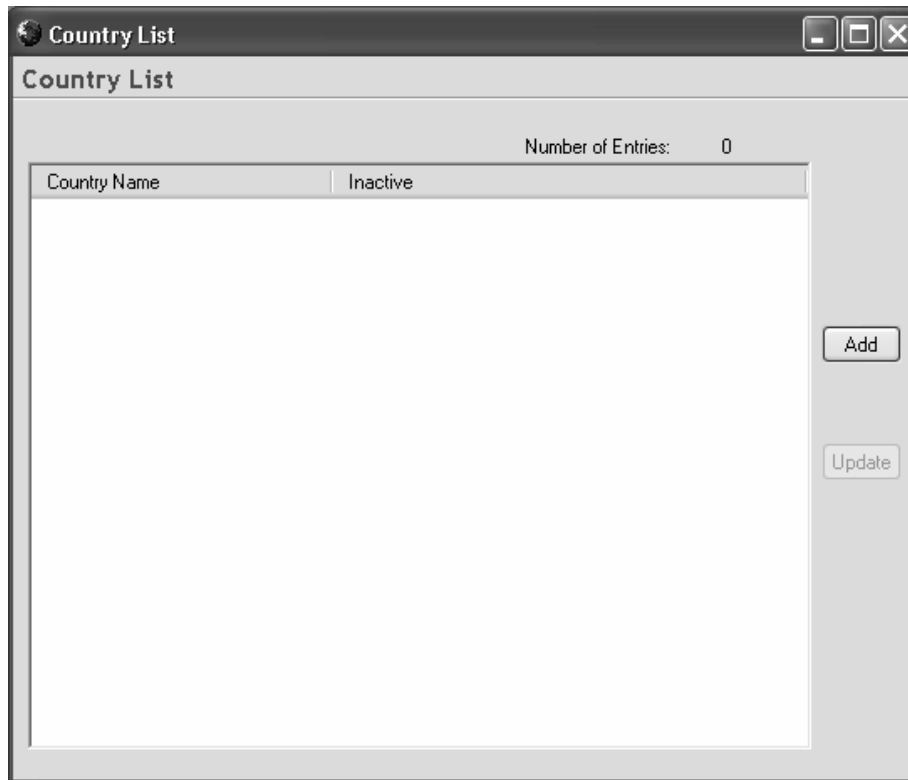
Country List

The Country List displays the predefined list of country names that you have defined.

Access

To access this panel select *Administration* and *Country List* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays a list of the country names defined in the system.

List Box Button Controls

Add

Displays the Add/Update Country Name pop-up box to allow the user to add a new country name to the list.

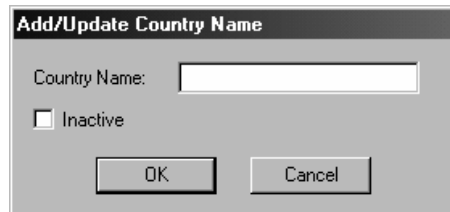
Update

Displays the Add/Update Country Name pop-up box to allow the user to update an existing country name in the list. This button is grayed out if there are no entries in the list box.

Add/Update Country Name Pop-Up Box

This pop-up box is used to add or update country names.

Pop-Up Box Layout



The screenshot shows a standard Windows-style dialog box titled "Add/Update Country Name". Inside the dialog, there is a text input field with the label "Country Name:". Below the input field is a checkbox with the label "Inactive". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

Country Name (Country.Country_Name)
The name of the country that is being defined.

Inactive (Country.Inactive_Flag)
If checked, indicates that this country name is no longer active. Inactive country names will not appear in the *Country* drop down field for selection.

Pop-up Button Controls

OK
Saves the current changes and closes the pop-up box.

Cancel
Closes the pop-up box without saving the current changes.

Account Types Panel

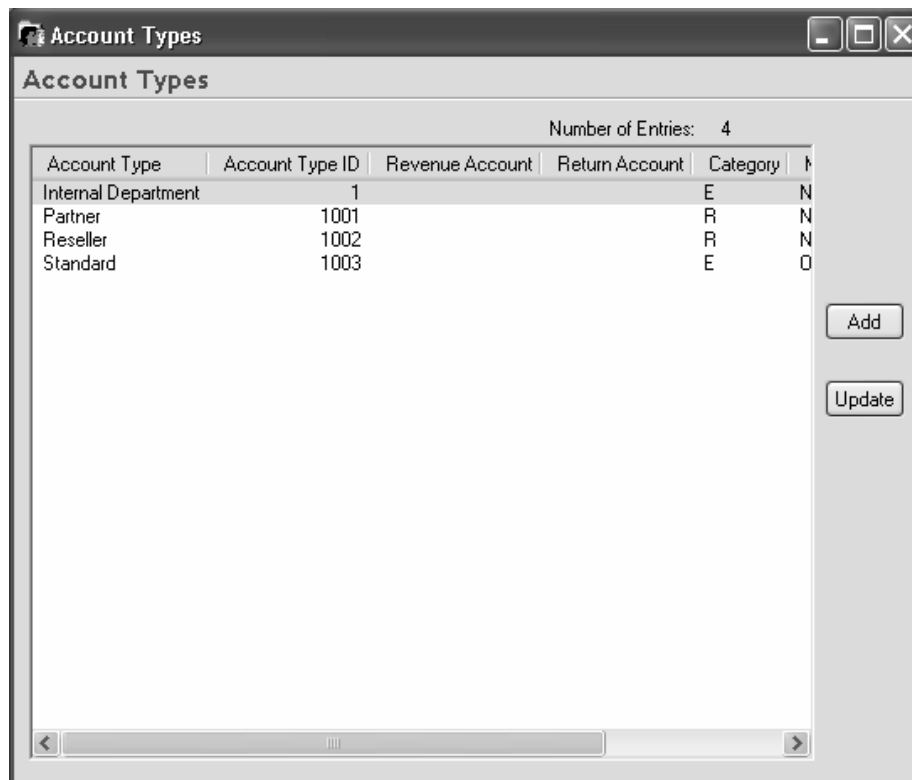
This panel is used to define account types which can be selected on the Account Information panel in the *Type* field.

The 'Internal Department' *Account Type* is a system defined value. It is used for the account record that is automatically created when a department is added.

Access

To access this panel select *Administration* and *Account Related* and *Account Types* from the menu bar.

Panel Layout



Panel Elements

List Box

Displays a list of the account types that have been defined for the organization.

Number of Entries

Displays the number of account types that have been defined for the organization.

List Box Button Controls**Add**

Displays the Define Account Type pop-up box to allow the user to add a new account type.

Update

Displays the Define Account Type pop-up box for the account type selected in the list. This button is disabled if there are no account types in the list.

Define Account Type Pop-Up Box

This pop-up box is used to add a new or update an existing account type.

Pop-Up Box Layout

Pop-Up Box Elements

Account Type

(Customer_Type.Customer_Type)

The descriptive name for this account type.

Revenue Account Code

(Customer_Type.Revenue_Account)

This field is provided for storing the revenue account id for interfacing to other systems.

Return Account Code

(Customer_Type.Return_Account)

This field is provided for storing the return account code for interfacing to other systems.

Inactive

(Customer_Type.Inactive_Flag)

Indicates that this account type is inactive. Inactive account types are not available for selection on the Account Information panel.

Category

(Customer_Type.Category)

Valid selections are 'End User' and 'Reseller'. If Reseller is selected, accounts with this type will appear in the *Reseller Account* drop down field.

Maintenance Lookup on Incident Handling (Customer_Type.Maint_Lookup)

Select the type of maintenance lookup you want performed from the Incident panel for this account type.

Do not perform a maintenance lookup

No checking of maintenance will be done from the Incident panel.

Display warning if declined or expired

A warning message showing the expiration date and number of calls taken since the maintenance contract expired will be displayed; if maintenance was declined, the warning message will say that maintenance was declined.

Display warning if declined, expired or no maintenance exists

The same processing will occur as for the previous selection, but a warning message will also be displayed if the account has no maintenance contract for the selected product.

Pop-up Button Controls**OK**

Saves the current changes and closes the pop-up box.

Cancel

Closes pop-up box without saving the current changes.

Maintenance Contract Types Panel

Maintenance contract types are used to define the attributes for a specific type of contract. Each type includes a maintenance class and other attributes that control the contract behavior. The contract types can apply to services provided, or product upgrades, or both.

Maintenance contract types must be defined before a contract can be entered.

The Maintenance Contract Types panel lists all the contract types that you have defined. From this panel you can add new types or update existing types. The information related to how incidents should be applied to a contract cannot be modified once an incident has been associated with a contract with the specific maintenance contract type.

Refer to the Maintenance Contracts section in the *CustomerFirst* or *SalesFirst* Reference manual for additional contract related information.

Access

To access this panel select *Administration* and *Account Related* and *Maintenance Contract Types* from the menu bar.

Panel Layout

Maintenance Contract Types

Maintenance Types: Number of Entries: 4

Type Name	Class	Support	Upgrade	Expire Action	Inactive
Annual Prepaid Calls	Paid Incs	Y		Invoice when expired	
Annual Prepaid Hours	Paid Time	Y		Invoice when expired	
Standard Annual Contract	No Limit	Y	Y		
Pay By Hours	Pay Time	Y			

Contract Description: This type of maintenance provides a specific number of support calls for the products/contracts covered on the contract. The customer will not be charged for a call to report a software defect. Upgrades are not included.

Incident Type Overrides:

Inc Type	Charge Action
Product Defect	No Charge

Buttons: Add, Update

Panel Elements

Maintenance Types List Box

Displays a list of the contract types that have been defined.

Number of Entries

The number of maintenance contract types that have been defined.

Related Information

Based on which item in the list is selected, related information is displayed below the list.

Contract Description (Maint_Type.Comments)

A description of the contract type that is highlighted in the list box.

Incident Type Overrides list box

Displays a list of incident types whose charge behavior has been overridden. The list is synchronized with the highlighted contract type in the Maintenance Types list box.

List Box Button Controls

Add

Displays the Maintenance Contract Type pop-up box where the user can add a new contract type. Upon saving the new contract type, the type is inserted into the Maintenance Type list box.

Update

Displays the Maintenance Contract Type pop-up box where the user can update the highlighted contract type in the list. This button is disabled if there are no entries in the Maintenance Type list box.

Maintenance Contract Type Pop-Up Box

This pop-up box is used to add or update a maintenance contract type.

Pop-Up Box Layout

Pop-Up Box Elements

Type Name (Maint_Type.Maint_Type_Name)
The name of the maintenance contract type.

Inactivate maintenance type (Maint_Type.Inactive)
If this check box is selected, the contract type is inactive. Inactive contract types will not be displayed in the *Maint. Type* drop down field on the Maintenance Contract panel.

Description (Maint_Type.Comments)
Free form user defined description of this maintenance contract type.

Category group box
Identifies the categories that apply to the contract type.

Support (Maint_Type.Support_Flag)
This is a service contract which can be associated with incidents. If this is not checked, any contracts with this type cannot be associated with incidents.

Upgrade (Maint_Type.Upgrade_Flag)

This contract includes product upgrades. An account with a contract of this type will be eligible to receive new product upgrades.

Maint. Class (Maint_Type.Maint_Class_Id)

Defines the process used for charging a contract. These selections are disabled if only the Upgrade option in the Category group box is selected.

Pay by

The account must arrange for payment each time an incident is opened.

Prepaid

The account must purchase a specific number of incidents or hours. When charges are processed for an incident, the charges will be decremented from the number of units. When the available units equals zero, the contract is set to an expired state.

Unlimited

The account may open an unlimited number of incidents for the period identified by the *Renewal Start Date* and *Expiration Date*.

Units (Maint_Type.Units_Id)

Defines the type of units that an account has purchased. These selections are disabled if 'Unlimited' is selected for the *Maint. Class*.

Hours

The type of units purchased is hours. When charge processing occurs for an incident, the charge amount is computed from the chargeable time fields specified in the incident time history events and the associated task time history events.

Incidents

The type of units purchased is incidents. When an incident is chargeable, one unit is charged for the incident regardless of the amount of chargeable time spent on the incident.

Charge Increment (Maint_Type.Min_Charge_Incr)

The total charges for an incident will be rounded by this amount when an incident is closed. This field only applies to 'Prepaid Hours' maintenance types.

Minimum Charge (Maint_Type.Minimum_Charge)

The minimum amount that is charged for an incident when it is closed. This amount is compared against the total charges incurred for the incident. If the total charges incurred are less than the minimum charge amount, the account will be charged the minimum amount. *Minimum Charge* must be a multiple of *Charge Increment*. This field only applies to 'Prepaid Hours' maintenance types.

Action When Expired (Maint_Type.Expired_Action_Id)

Defines the type of action to take when a contract has expired. This field only applies to Prepaid contract types.

Invoice when expired

The units will be displayed in the *Invoice* column on the Charges tab of the Contract panel and the Contract Charges for Incident panel, and the *Invoice for Contract* column on the Maintenance Charge Search Results and the Incident Maintenance Information panel.

Display message

A message will be displayed for the user.

Invoice and Display message

The units will be displayed in the *Invoice* column on the Charges tab of the Contract panel and the Contract Charges for Incident panel, and the *Invoice for Contract* column on the Maintenance Charge Search Results and the Incident Maintenance Information panel. In addition, a message will be displayed for the user.

Use Payment Type

The user can select a specific payment type.

Payment Type (Maint_Type.Payment_Type_Id)

For Pay by contract types, identifies the default payment method for new incidents.

Expiration Policy (Maint_Type.Expire_Policy)

User defined comments about the expiration policy for this maintenance contract type. These comments will be displayed when an incident is opened for an expired contract and the 'Display Expiration Policy' in the *Action When Expired* field is selected.

Incident Type list box

Displays a list of all incident types and the override action specified for the incident type.

By default, each incident type takes on the charge behavior of the maintenance class that was selected. There may be cases where you do not wish to charge an account for certain incident types. For example, incident types for a prepaid maintenance class by default are charged against purchased block of units. For product defects, you may not want to charge the account; so you would override the default behavior to be 'No Charge'.

You can override an incident type's behavior by highlighting the incident type and selecting an override action from the Charge action override group box. This list box is grayed out if only the *Upgrade* option in the Category group box is selected.

Charge action override group box

Contains the different override actions for an incident type. Selecting an option changes the incident type charge behavior of the incident type highlighted in the incident type list box. The list box 'Override' column is updated to reflect the change. This group box and the options are disabled only if the *Upgrade* option in the Category group box is selected.

No Charge

Causes the charges for this incident type not to be charged against a contract with a 'Prepaid' maintenance class or invoiced for a 'Pay by' maintenance class. This option is disabled for an 'Unlimited' maintenance class.

No Override

Causes the incident type to revert to its default charge behavior for the maintenance class. The override entry in the Inc_Type_Override table is deleted.

Invoice

Causes the billing for this incident type to be processed via invoice. This is only available if for an 'Unlimited' maintenance class.

Pop-up Button Controls**OK**

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

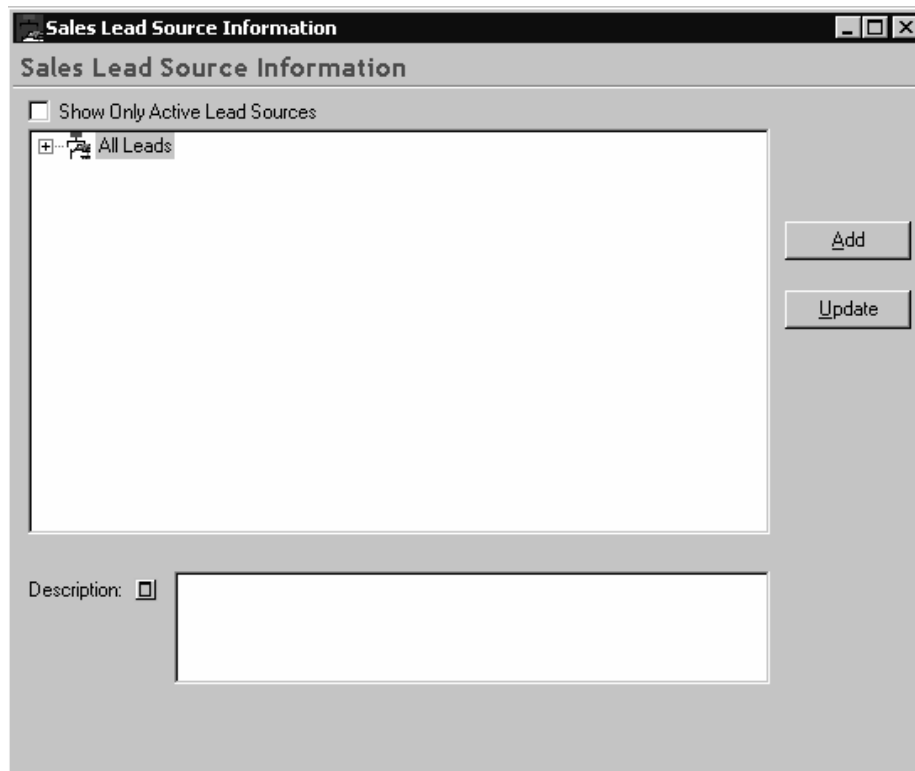
Sales Lead Source Information Panel

Lead sources can be defined to identify how you became aware of an account and how the account became aware of your organization. The Sales Lead Source Information panel allows the user to view the hierarchy of lead sources that have been defined.

Access

This panel is accessed through *SalesFirst* by clicking the *Open* icon and selecting *Lead Sources*.

Panel Layout



Pop-Up Box Elements

Show Only Active Lead Sources

If this checkbox is checked, only active lead sources are displayed in the list.

Lead Source tree

This tree structure contains a hierarchical list of all the lead sources.

Related Information

Based on which item is selected, related information is displayed.

Description

The description of the lead source selected in the tree structure.

Button Controls**Add**

Displays the Add/Update Lead Source pop-up box to allow the user to add a new lead source to the hierarchy

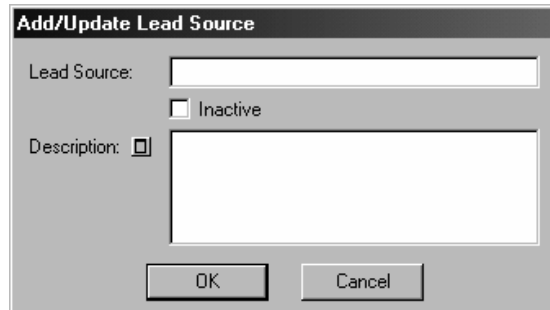
Update

Displays the Add/Update Lead Source pop-up box to allow the user to update the selected lead source.

Add/Update Lead Source Pop-Up Box

This pop-up box allows the user to add a new lead source or update an existing one. The new lead source will be added to the level below the selected level in the hierarchy.

Pop-Up Box Layout



Pop-Up Box Elements

Lead Source (Specific_Source.Specific_Source)
The name of the lead source.

Inactive (Specific_Source.Inactive_Flag)
If this checkbox is checked, indicates that the lead source is inactive.

Description (Specific_Source.Description)
A description of the lead source.

Pop-up Button Controls

OK
Adds the selected lead source and closes the pop-up box.

Cancel
Closes the pop-up box without saving any changes.

Section 13

Other Administration Functions

Section 13

Other Administration Functions

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File Download Manager

The File Download Manager functionality allows you to provide access to specific files for your accounts via *WebFirst* and for your internal users via *CustomerFirst* and *SalesFirst*. The files can be viewed and/or extracted by the user.

For *WebFirst* users, from the File Download Manager, you can control the files that can be accessed based upon the *Account*, *Product*, the account or user's *User Class*, the account's *User Group*, and the contract *Maintenance Type*. The *Restrict products in WebFirst to* option defined on the User Group Preferences panel will be used in conjunction with the access defined in the File Download Manager to determine which files can be accessed.

For internal users, from the File Download Manager, you can control the files that can be accessed based upon the *Person*.

System Processing

- Each time a file is downloaded, an entry is made in the database that identifies what file was downloaded, when it was downloaded, and who downloaded it.
- If a file is associated with a specific *Product Refresh*, when a user downloads the file from *WebFirst*, the *Product Refresh* will be automatically added to the account's shipped products.

File Download Manager Panel

From the File Download Manager panel you can do the following:

- Define file folders and put them in the appropriate hierarchy
- Define the security associated with each folder
- Add the appropriate files to each folder

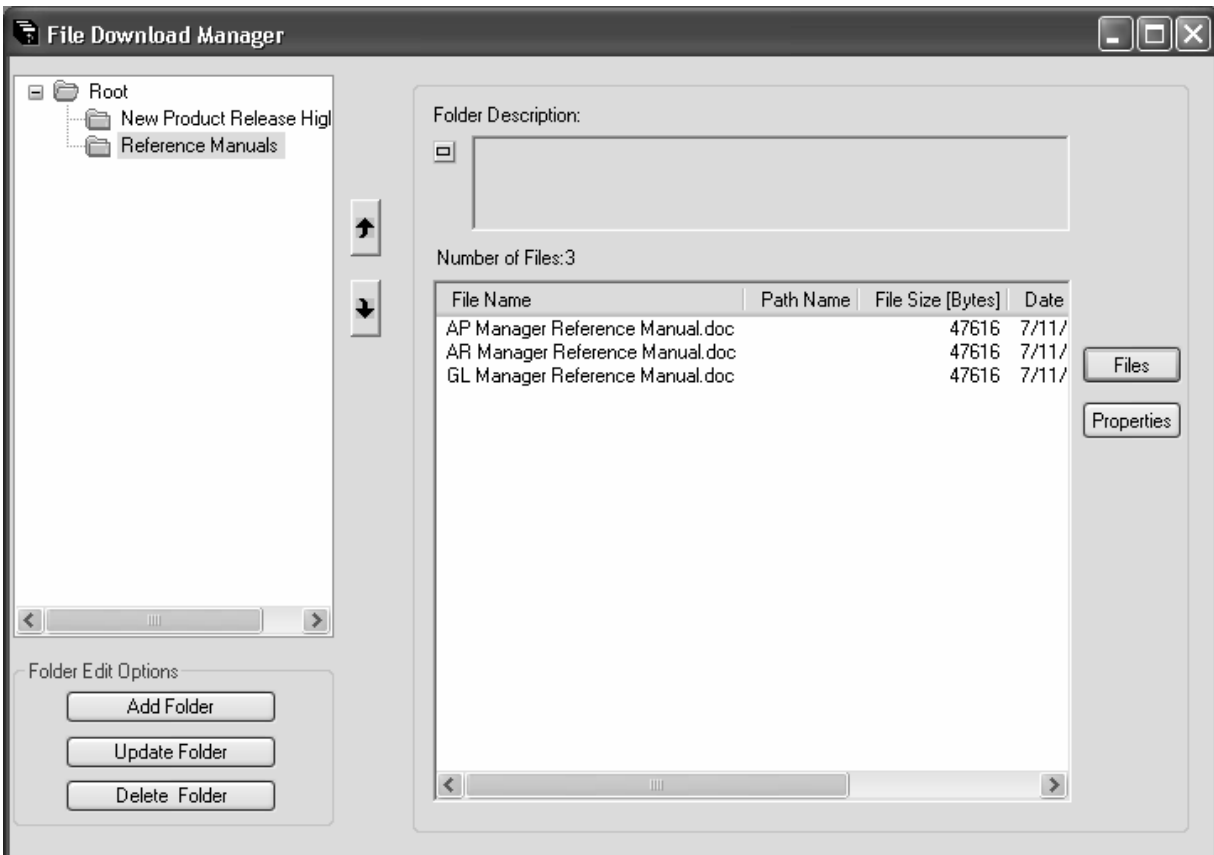
System Processing

- When a folder is deleted, all sub-folders are deleted, and any files contained in those folders.

Access

To access this panel click on the *Arrow* next to the *Open* icon and select *File Download Manager*.

Panel Layout



Panel Elements

Folder Tree

Displays a hierarchical list of the file folders that have been predefined. A folder can be moved within the hierarchy using the up and down arrows.

Folder Description

Displays the description of the folder that is selected in the folder tree.

Tree Button Controls

Up Arrow

Moves the selected folder up in the list.

Up Arrow

Moves the selected folder down in the list.

Add Folder

Displays the Add/Update Folder pop-up box to allow the user to add a new folder to the tree. When the user clicks this button, a new folder is added to the tree structure in the level below the folder that is currently selected.

Update Folder

Displays the Add/Update Folder pop-up box to allow the user to update the folder selected in the tree.

Delete Folder

Removes the folder selected in the tree structure, sub-folders under the selected folder, and all files in the folders. This button is disabled if the 'Root' folder is the only folder displayed in the tree.

Files List Box

Displays a list of the files that have been added for the folder selected in the folder tree.

Number of Files

The total number of files displayed in the list box for the selected folder.

List Box Button Controls

Files

Displays the Add/Update File(s) pop-up box to allow the user to add files to the folder selected in the tree.

Properties

Displays the Properties pop-up box to allow the user to identify the product refresh that should be added as a shipped product for the account when this file is downloaded through *WebFirst*.

Add/Update Folder Pop-Up Box

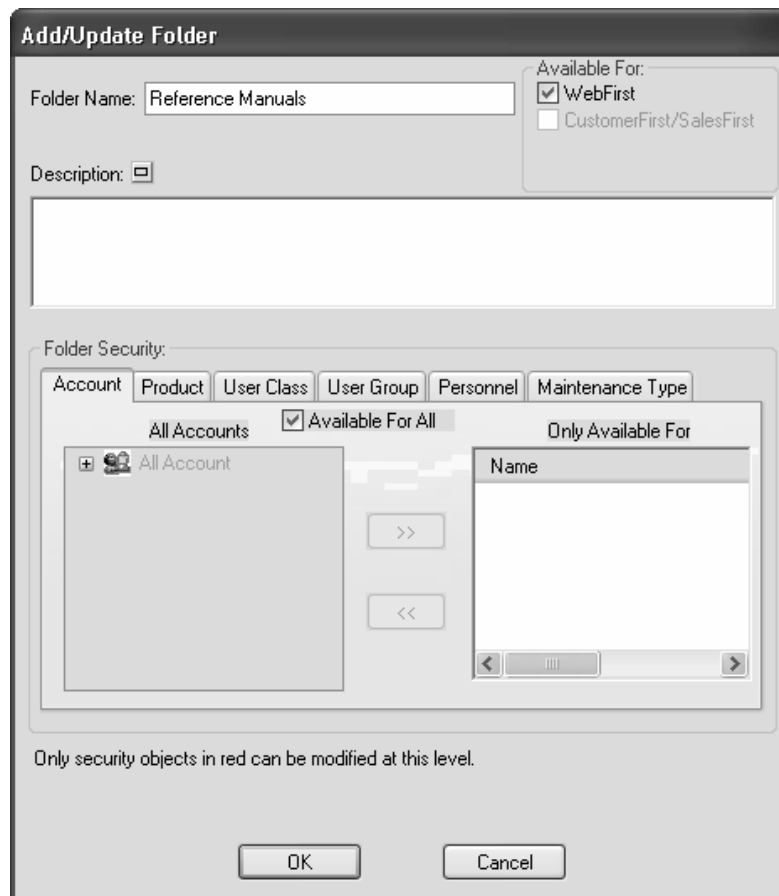
This pop-up box allows the user to add new folders and update existing folders that were selected in the folder tree when the *Add Folder* or *Update Folder* button is clicked.

The security settings from the parent folder are displayed in red at the sub folder level. The security settings for the parent folder cannot be changed at the sub folder level.

System Processing

- Security access defined for a folder will automatically be passed down to all subfolders.
- If the user's access is restricted in any way to the folder, then that folder is not displayed when the user logs into the system.
- For *WebFirst* users, the *Restrict products in WebFirst to* option defined on the User Group Preferences panel will be used in conjunction with the access defined on this pop-up to determine which files can be accessed.

Pop-Up Box Layout



Add/Update Folder

Folder Name: Reference Manuals

Available For:
 WebFirst
 CustomerFirst/SalesFirst

Description:

Folder Security:

Account Product User Class User Group Personnel Maintenance Type

All Accounts Available For All Only Available For

All Account

Name

Only security objects in red can be modified at this level.

OK Cancel

Pop-Up Box Elements

Folder Name (RTI_Folder.Name)
The name of the file folder.

Available For
Indicates from which application(s) this folder will be available. If a checkbox is not checked at the parent folder level, the checkbox will not be enabled at the sub folder level.

Description (RTI_Folder.Description)
The description of the folder.

Folder Security
This group box contains information related to the user's access to this particular folder. A sub folder will contain the security settings for its parent folder.

Account Tab (RTI_File_Access.Access_Type)
Contains a list of all active accounts in the database and a list of those accounts that have access to the folder if it is not all accounts. By default all accounts have access to the files in this folder. This can only be used for *WebFirst* user access.

Available For All checkbox
If checked, all active accounts in the database have access to the files in the folder. If unchecked, the All Accounts list is enabled to allow the user to select specific accounts for whom the files will be available.

Product Tab (RTI_File_Access.Access_Type)
Contains a list those products for which the folder applies and a list of those products for which the folder does not apply. This can only be used for *WebFirst* user access.

User Class Tab (RTI_File_Access.Access_Type)
Contains a list of user classes that have access to the folder and a list of those user classes that do not have access to the folder.

User Group Tab (RTI_File_Access.Access_Type)
Contains a list of user groups that have access to the folder and a list of those user groups that do not have access to the folder. This can only be used for *WebFirst* user access.

Personnel Tab (RTI_File_Access.Access_Type)
Contains a list of all active personnel in the database and a list of those personnel that have access to the folder if it is not all personnel. By default all personnel have access to the files in this folder. This can only be used for *CustomerFirst* and *SalesFirst* user access.

Available For All checkbox
If checked, all active personnel in the database have access to the files in the folder. If unchecked, the All Personnel list is enabled to allow the user to select specific personnel for whom the files will be available.

Maintenance Type Tab (RTI_File_Access.Access_Type)
Contains a list those contract types for which the folder applies and a list of those contract types for which the folder does not apply. This can only be used for *WebFirst* user access.

Pop-up Button Controls

OK

Saves the information and closes the pop-up box.

Cancel

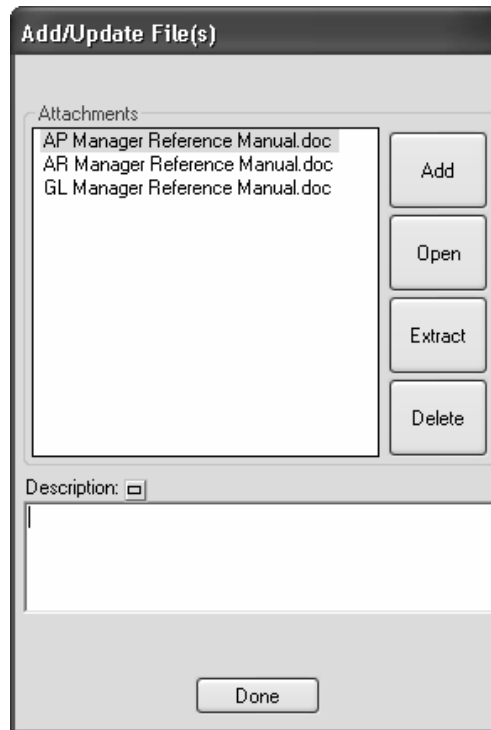
Closes the pop-up box without saving any changes.

Add/Update File(s) Pop-Up Box

This pop-up box allows the user to add one or more files to the folder selected in the folder tree.

If the file is not stored in the database, then the file path must be valid for the machine where the Application Server is running.

Pop-Up Box Layout



Pop-Up Box Elements

Attachments box

Displays a list of the files for the folder selected in the folder tree.

Related Information

Based on which item in the list is selected, related information is displayed.

Description

The description of the file selected in the Attachments box. To add a description for a file, highlight an attachment and enter the description of the attachment.

Pop-up Button Controls

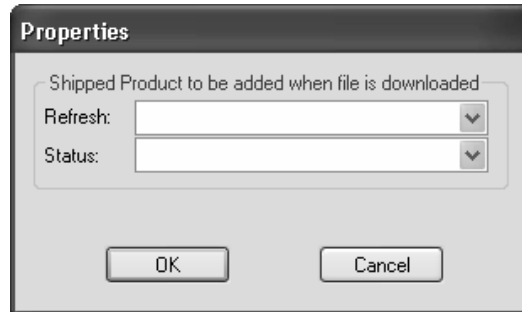
Done

Closes the pop-up box.

Properties Pop-Up Box

This pop-up allows the user to identify the product refresh that should be added as a shipped product for the account when this file is downloaded through *WebFirst*.

Pop-Up Box Layout



Pop-Up Box Elements

Refresh (Refresh_File.Refresh_Id)
Displays a list of the active product refreshes in the database. The selected Refresh will be added as a shipped product for the account when the specific file is downloaded from *WebFirst*.

Status (Refresh_File.Status_Id)
Displays the available shipped product statuses. The selected *Status* will be used for the shipped product that is added for the account when the specific file is downloaded from *WebFirst*.

Pop-up Button Controls

OK
Saves the information and closes the pop-up box.

Cancel
Closes the pop-up box without saving any changes.

Product Family Maintenance Panel

This panel is used to maintain product versions, implementations, and refreshes for all products in a specific product family at one time. This is useful if the product version, implementation, and refresh information is the same for all products in a product family. Any action performed here applies to all products in the product family.

Products and associated product versions, implementations, and refreshes cannot be deleted.

Note: You must have the appropriate item selected in the Refresh Information list box when you perform a function from this panel. It is important to remember that actions performed here will impact multiple products.

Refer to the Products & Equipment section of the *CustomerFirst* Reference manual for additional product related information.

Access

You can access the Product Family Maintenance panel by clicking on the arrow next to the *Open* icon on the tool bar and selecting *Product Family Maintenance*. You can also select *File* and *Open* and *Product Family Maintenance* from the menu bar.

Menu Bar Choices

Product Family

Ship to Account

Uppgrade All Covered Accounts

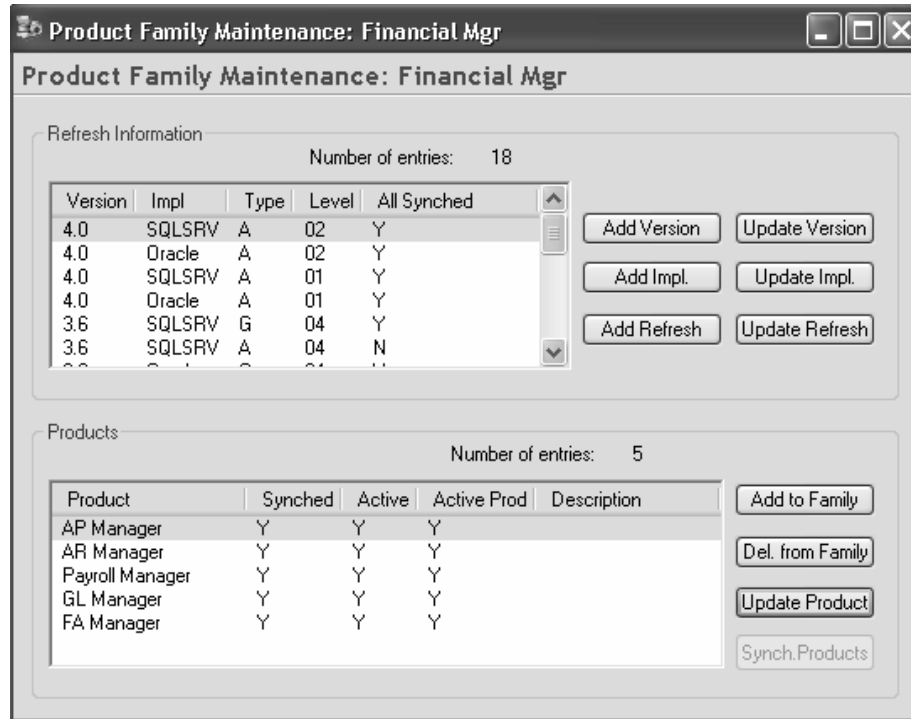
Ship to Account

Displays the Ship To Account pop-up box to record shipment to a specific account of the selected Refresh for all products in the family. This menu option is disabled if the selected product is inactive.

Upgrade All Covered Accounts

Displays the Upgrade All Covered Accounts pop-up box to record shipment of the selected Refresh for all products in the Product Family to accounts having valid upgrade maintenance contracts for those products. This menu option is disabled if the selected product is inactive.

Panel Layout



Panel Elements

Refresh Information list box

Displays the versions, implementations and refreshes that have been added for one or more products in the product family. There is a separate line entry for each Version/Implementation/Refresh combination. If the refresh is defined for all products, the *All Synched* field is displayed as 'Y'.

If there are no defined versions in the product family, a single line appears in this list box with a version name displayed as <none>. When a new version is added, this version is updated with the new version information if it has not been shipped to an account or associated with an incident. Otherwise, when adding a version a new line is created where the implementation name and refresh name are blank. The same behavior holds true when adding a new implementation. When adding a new refresh for an implementation, if the refresh which does not have a name has not been shipped to an account or does not appear on any incidents, it is updated with the new refresh information. Otherwise a new line is created for the new refresh.

Number of entries (Refresh Information list box)

The number of product refreshes listed for the product family.

Products list box

Displays all of the products in the product family.

Number of entries (Products list box)

The number of products associated with the product family.

Button Controls

Add Version

Displays the Product Version pop-up box to add a new version for all products in the product family that do not already have the new version. If a *Support End Date* is entered on the pop-up box it will also be used to update existing versions with the same *Version Name* for products in the product family.

Update Version

Displays the Product Version pop-up box to update the selected *Version* in the Refresh Information list box. If the *Version Name* is modified, all versions in the product family that have the original *Version Name* will be modified.

Add Impl.

Displays the Product Implementation pop-up box to add an implementation for the selected *Version* in the Refresh Information list box. Data entered on the pop-up box will also be used to update existing implementations for the version selected that have the same *Implementation Name*.

Update Impl.

Displays the Product Implementation pop-up box to update the selected *Implementation* in the Refresh Information list box. If the *Implementation Name* is modified, the implementations for the version selected that have the same name as the original name will also be updated.

Add Refresh

Displays the Refresh Levels pop-up box to add a refresh for the selected *Version/Implementation* in the Refresh Information list box. The data entered on the pop-up box will also be used to update existing refreshes having the same refresh type and level for the version/implementation selected.

Update Refresh

Displays the Refresh Levels pop-up box to update the selected *Refresh* in the Refresh Information list box.

Add to Family

Displays the Add Product to Product Family pop-up box to allow products to be added to this product family.

Del. from Family

Removes the highlighted product from the product family. The product still exists. But it is no longer associated with the product family.

Update Product

Displays the Product Information panel for the highlighted product.

Synch. Products

This button will add the selected *Refresh* to all products in the product family that do not already have the refresh. After this processing is complete, the *All Synched* field for each product shows 'Y' for the selected refresh. This button is disabled when the *All Synched* field for the selected Refresh is 'Y'.

Add Product to Product Family Pop-Up Box

This pop-up box is used to select a product to be added to the product family.

Pop-Up Box Layout



Pop-Up Box Elements

Product Name (Product.Name)
The name of the product to be added to the product family.

Button Controls

OK

Adds the product to the product family and closes the pop-up box.

Cancel

Closes the pop-up box without saving the current changes.

Audit Trail and Locked Contacts

The audit trail functionality allows your organization to track all changes made to selected tables in the database. An audit trail is only created when an existing record is updated. The system does not create an audit trail for new records.

Any changes that are made can be found by using the Audit Trail Search. For additional information about this search, refer to the Usage Monitoring and Administrative Queries section of this manual.

In addition, you can lock a specific column in the Cust_Personnel table to be used in conjunction with the *Locked* field on the Account Contact panel. This allows you to disable a specific field for a specific contact on the Account Contact panel.

Maintain Table and Column Information Panel

From this panel you can identify which tables you want to be audited. If a table is selected, an audit record will be created for each update to an existing record in the table. In addition, you can lock a specific column in the Cust_Personnel table to be used in conjunction with the *Locked* field on the Account Contact panel.

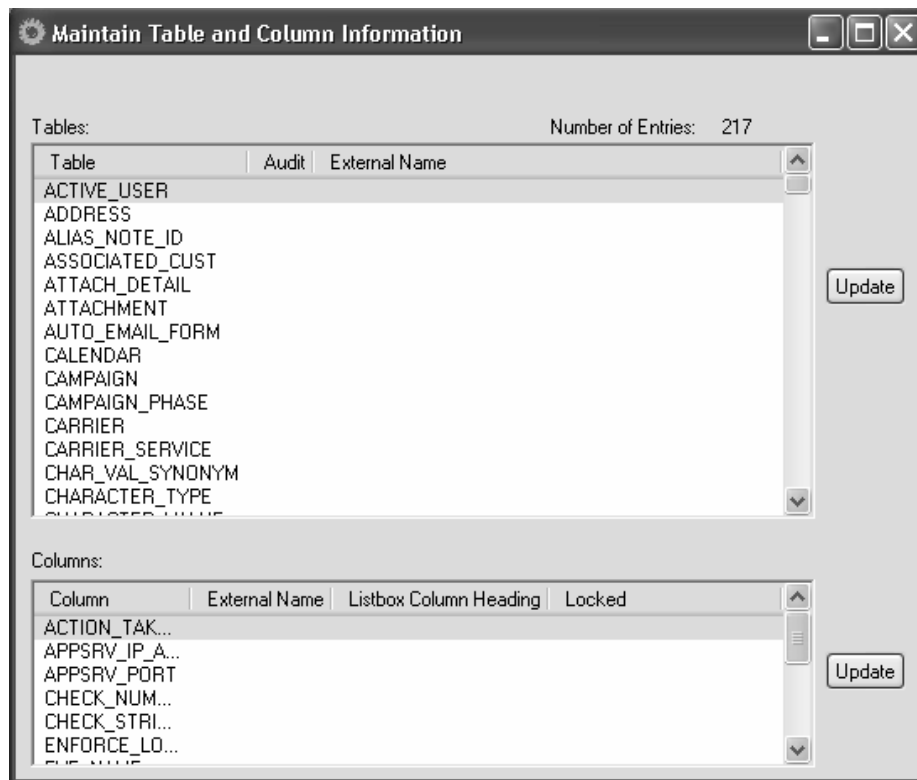
System Processing

If a table is being audited, when an existing record in the table is updated, an audit record will be created in the RTI_Audit table.

Access

To access this panel select *Administration* and *Database Related* and *Maintain Table/Column Info* from the menu bar.

Panel Layout



Panel Elements

Tables list box

Displays a list of the tables in the database. A 'Y' in the *Audit* column indicates that the table is currently being audited.

Number of Entries

The number of tables displayed in the list box.

List Box Button Controls

Update button

Displays the Update Table Information pop-up box to allow the user to turn the audit trail for the selected table on or off.

Columns list box

Displays a list of the columns in the table selected in the Tables list box.

List Box Button Controls

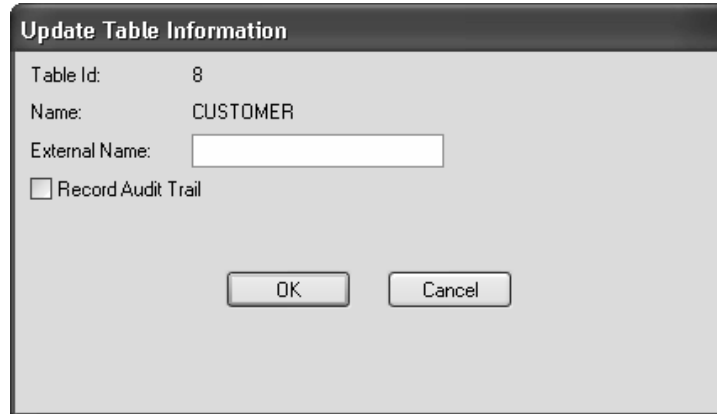
Update button

Displays the Update Table Information pop-up box to allow the user to lock a specific column in the Cust_Personnel table.

Update Table Information Pop-Up Box

This pop-up box is used to allow the user to turn the audit trail for the table on or off.

Pop-Up Box Layout



Pop-Up Box Elements

Table Id

The unique identifier of the table.

Name

The name of the table as it appears in the database.

External Name

The alternate name for the table for use with Pivot Tables.

Record Audit Trail

If this checkbox is checked, when an update is made to an existing record in the table, the system will create an audit record in the RTI_Audit table.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

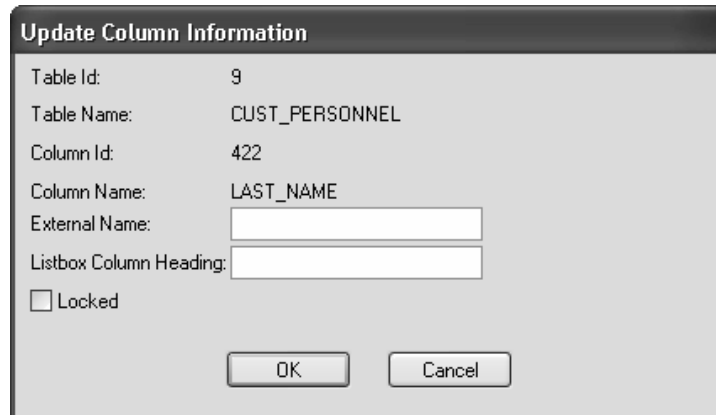
Cancel

Closes the pop-up box without saving any changes.

Update Column Information Pop-Up Box

This pop-up box allows the user to lock a specific column in the Cust_Personnel table. This is used in conjunction with the *Locked* field on the Account Contact panel. This allows you to disable a specific field for a specific contact on the Account Contact panel. For example, specific contact information may be imported on a regular basis from the accounting system and should not be updated from *CustomerFirst*.

Pop-Up Box Layout



Update Column Information

Table Id: 9
Table Name: CUST_PERSONNEL
Column Id: 422
Column Name: LAST_NAME
External Name:
Listbox Column Heading:
 Locked

OK Cancel

Pop-Up Box Elements

Table Id

The unique identifier of the table to which the column belongs.

Table Name

The name of the table to which the column belongs.

Column Id

The unique identifier of the column.

Column Name

The name of the column as it appears in the database.

External Name

A user defined name for the column. Refer to the Screen & List Box Customization section of this manual for additional information

Listbox Column Heading

A user defined name for the column to be used in list boxes. Refer to the Screen & List Box Customization section of this manual for additional information.

Locked

If this checkbox is checked, and a contact is marked as *Locked*, the field that corresponds to this column in the Cust_Personnel table is disabled in the user interface for that contact. Only available for columns in the Cust_Personnel table.

Pop-up Button Controls

OK

Closes the pop-up box and saves the changes.

Cancel

Closes the pop-up box without saving any changes.

Define Table Keys Panel

Typically database keys should only be created for replication and synchronization purposes. However, you may also need to modify database keys following a data import. For example you may want the incidents that are actually entered in *CustomerFirst* to begin with a different number in order to differentiate the two.

This panel is used to define ranges of database keys for different replication servers or for synchronization users. It is also used to modify a specific database key.

Access

To access this panel select *Administration* and *Database Related* and Define Database Keys from the menu bar.

Panel Layout

Description	Next Key Value	Maximum Key Value
Next Incident Id	1045	1001023
Next Temporary_Fix Id	1002	1001002
Next Cust_Personnel Id	557	1000545
Next Personnel Id	33	1000023
Next Department Id	157	1000154
Next Codes Id	1667	2637
Next Product_Impl Id	6039	1006037

Panel Elements

Current Database

Indicates that the Defined Key Ranges list box will be populated with the keys for the current database.

Database Server

Indicates that the Defined Key Ranges list box will be populated with the keys for the selected server in this field.

Add button

Displays the Generate Keys for New Replication Server pop-up box to allow the user to identify a new server and the maximum records for all tables.

Synchronization User

Indicates that the Defined Key Ranges list box will be populated with the keys for the selected synchronization user.

Add button

Displays the Generate Keys for New Synchronization Client pop-up box to allow the user to identify a new synchronization user and the maximum records for all tables.

Defined Key Ranges list box

This list box displays the keys for the option selected in the Key Range Criteria group box and the corresponding value if applicable.

Update button

Displays the Update Key pop-up box for the selected key to allow the user to change the next key value and maximum key value.

Pop-up Button Controls**Generate**

Displays the Generate Maximum Values For All Keys pop-up box to allow the user to identify the maximum key value for all keys for the *Current Database*.

Lookup

Refreshes the values in the Defined Key Ranges list box for the selected value from the Key Range Criteria group box.

Export

Creates a file that contains the SQL statements used to generate the Defined Key Ranges for the selected value from the Key Range Criteria group box. Clicking this button displays the Save As pop-up box to allow the user to define the location of the file.

Delete

Allows the user to delete the selected *Database Server* or *Synchronization User*.

Generate Maximum Values For All Keys Pop-Up Box

This box is used to set the maximum key value for each key value in the *Current Database*.

Pop-Up Box Layout



Pop-Up Box Elements

Maximum Records For All Tables

Indicates the maximum record value for each key value. This number is added to the *Next Key Value* for each key value to determine the *Maximum Key Value*.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

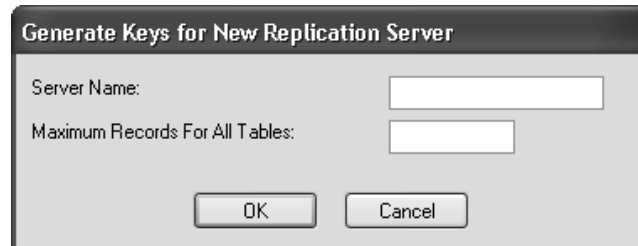
Cancel

Closes the pop-up box without saving any changes.

Generate Keys for New Replication Server Pop-Up Box

This box is used to identify a new server and the maximum records for all tables.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Generate Keys for New Replication Server". It contains two text input fields. The first is labeled "Server Name:" and the second is labeled "Maximum Records For All Tables:". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

Server Name

The name of the server for which the maximum records for all tables will be defined.

Maximum Records For All Tables

Indicates the maximum record value for each key value. This number is added to the *Next Key Value* for each key value to determine the *Maximum Key Value*.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

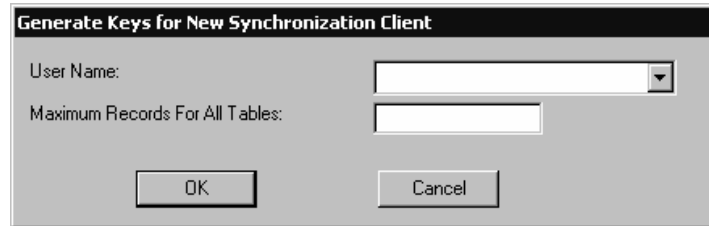
Cancel

Closes the pop-up box without saving any changes.

Generate Keys for New Synchronization Client Pop-Up Box

This box is used to identify a new synchronization user and the maximum records for all tables.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Generate Keys for New Synchronization Client". It features two input fields: "User Name:" which is a dropdown menu, and "Maximum Records For All Tables:" which is a text input field. Below these fields are two buttons: "OK" and "Cancel".

Pop-Up Box Elements

User Name

The name of the synchronization user for which the maximum records for all tables will be defined.

Maximum Records For All Tables

Indicates the maximum record value for each key value. This number is added to the Next Key Value for each key value to determine the Maximum Key Value.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

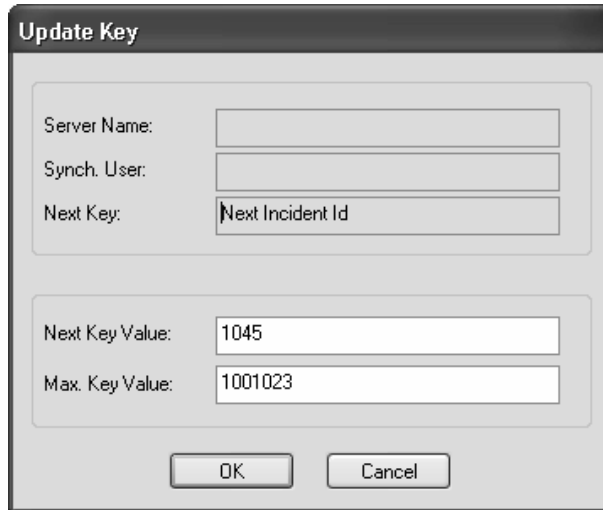
Cancel

Closes the pop-up box without saving any changes.

Update Key Pop-Up Box

This box is used to change the *Next Key Value* or *Max. Key Value* for a specific key value for the selected option from the Key Range Criteria group box.

Pop-Up Box Layout



The screenshot shows a dialog box titled "Update Key". It contains the following fields and values:

- Server Name: [Empty]
- Synch. User: [Empty]
- Next Key: Next Incident Id
- Next Key Value: 1045
- Max. Key Value: 1001023

Buttons: OK, Cancel

Pop-Up Box Elements

Server Name

The name of the server to which the database keys belong. If Current Database is selected in the Key Range Criteria group box, this field is blank.

Synch. User

The name of the synchronization user to which the database keys belong. If Current Database is selected in the Key Range Criteria group box, this field is blank.

Next Key

The key value which will be updated.

Next Key Value

The value entered will become the next key value.

Max. Key Value

The value entered will become the maximum key value.

Pop-up Button Controls

OK

Closes the pop-up box and saves any changes.

Cancel

Closes the pop-up box without saving any changes.

Archiving

CustomerFirst provides the ability to remove selected items from the database and store them “off line”. Archived data cannot be accessed directly by *CustomerFirst*. However, it can be restored to a *CustomerFirst* database for the same version and release that was in operation at the time that the archive was made. An archive set must be restored in its entirety. Data should be restored to a database with the appropriate related data item for this archive. For example, the products that are referenced by a set of archived problems must be defined either in the database or be part of the archive set that is being restored.

Make sure that you have a backup of the database prior to archiving any data.

The following objects can be archived:

- Incidents from Incident Search (5.0 G01)
- Problems from Problem Search (Future Release)
- Tasks from Task Search (Future Release)
- Sales Opportunities from Sales Opportunity Search (Future Release)
- Accounts from Account Search (Future Release)
- Maintenance Contracts from Maintenance Contract Search (Future Release)
- Product Information from System Administration (Future Release)

Access

- From the particular search panel, select the *search name* and *Archive Query Results* from the menu bar.
- For products, select *Administration* and *Database Related* and *Archive Product Version* from the menu bar.

Archive Query Results Panel

From this panel you can select specific options, identify the archive field, and begin the archive process. Make sure that you have a backup of the database prior to archiving any data.

Panel Layout

The screenshot shows a window titled "Archive Query Results" with the following elements:

- Object to be Archived:** Incident
- Number of records:** 7
- Action Taker:** Beamish, Deb
- Archive Options:**
 - Show records to be archived
 - Archive records
 - Update and delete archived records
 - Archive, update and delete records
- Process** button
- Archive the problem if all its incident(s) have been archived
- Save archive file as:** [Empty text field] **Browse** button
- Comments:** [Empty text area]

Panel Elements

Object to be Archived

Identifies the type of object that will be archived.

Number of records

Identifies the number of records that will be archived.

Action Taker

The user who is performing the archive.

Archive Options

Show records to be archived

If this is checked, when you click the *Process* button you will be able to view the tables and records that will be exported. The View Records to be Archived pop-up is displayed.

Archive records

If this is checked, when you click the *Process* button records will be exported to the specified .arch file. After this process is completed the *Update and delete archived records* option is enabled. You can then run the update and delete process separately.

Update and delete archived records

If this is checked, when you click the *Process* button it will update records in other tables as needed based upon what is being exported, and delete the archived records from the database. An example of an update is when an incident is archived and the problem remains, the *Incident_Count* field in the problem table will be updated.

Archive, update and delete records

If this is checked, when you click the *Process* button records will be exported to the specified .arch file, records in other tables will be updated as needed, and the archived records will be deleted. All archive processes are completed.

Archive the problem if all its incident(s) have been archived

If all of the incidents for one or more problems are being archived, you can indicate whether you want the problem records to be archived. If the problems are not archived, they will be flagged as problem only records in the database.

Save archive file as:

Identify the archive file name. The archive file will default to .arch as the extension.

Comments

Information about the actual archive process will be displayed in this field.

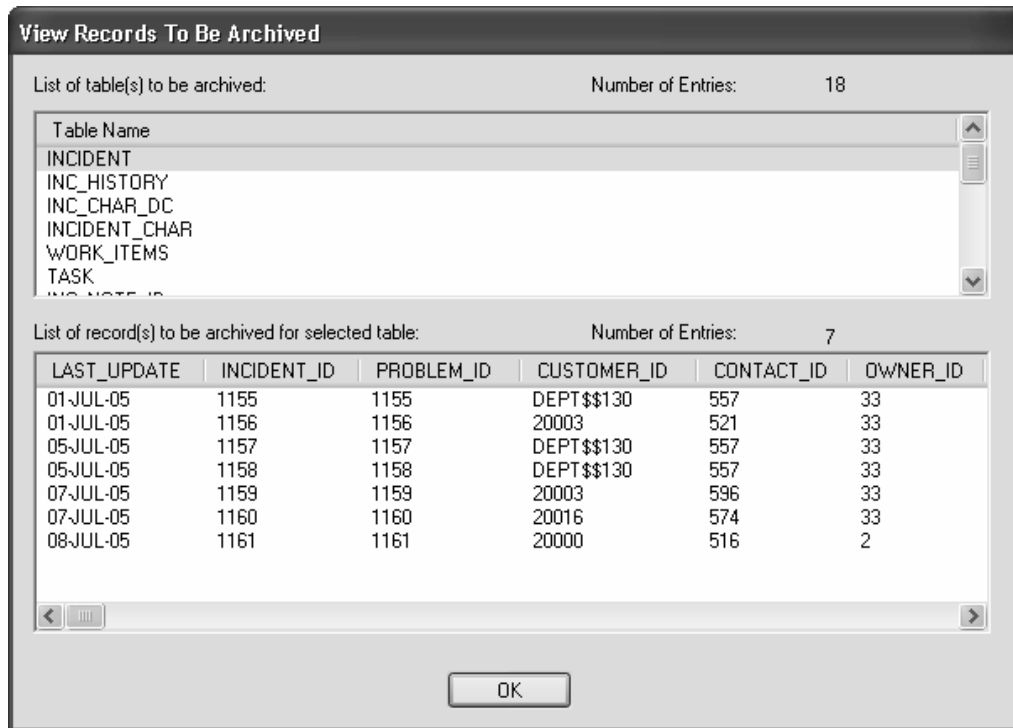
Pop-up Button Controls**Process**

Performs one or more actions based on the *Archive Options* selected.

View Records To Be Archived Pop-Up Box

This pop-up allows the user to view the records that will be archived in each table.

Pop-Up Box Layout



Pop-Up Box Elements

List of table(s) to be archived

Displays a list of the tables where a record will be archived.

Number of Entries

The number of tables displayed in the list box.

List of records(s) to be archived for selected table

Displays a list of the records that will be archived for the selected table.

Number of Entries

The number of records displayed in the list box.

Pop-up Button Controls

OK

Closes the pop-up box.

Restore Archived Data Panel

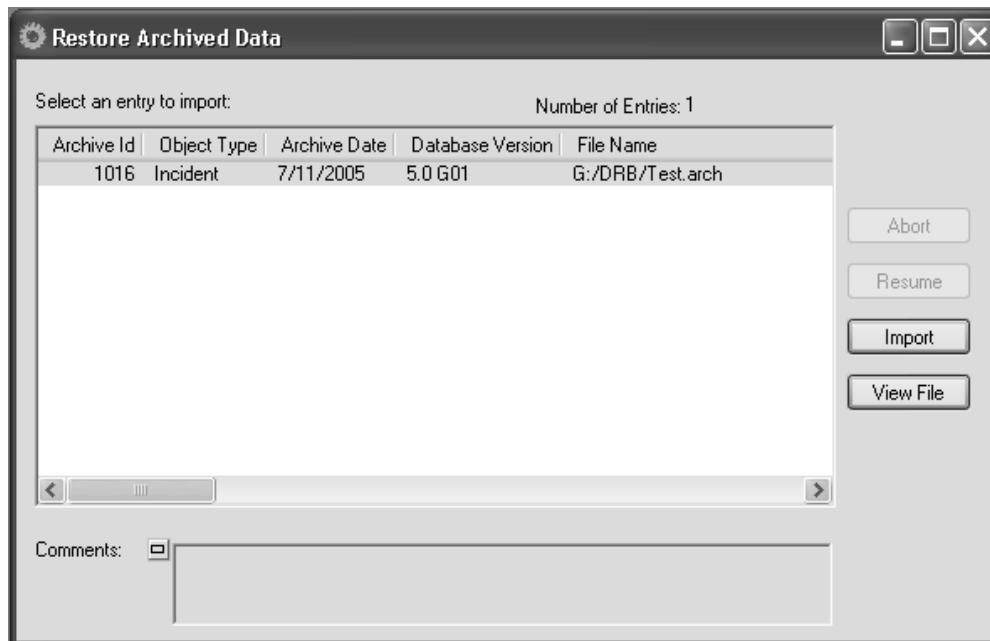
This panel identifies the archived files. From here you can restore the data in a specific file.

In order to restore archived data, the database must be at the same level (i.e. 5.0 G01) as when the archive was completed.

Access

To access this panel select *Administration* and *Restore Archived Data* from the menu bar.

Panel Layout



Panel Elements

Archived Files List

Displays a list of the archived files that includes when each file was archived, the version/release of the database when it was archived, and the name of the file, number of records, etc.

Number of Entries

The number of files displayed in the list box.

List Box Button Controls

Abort

Stops the import process once it has been started.

Resume

Restarts the import process if it was stopped previously for the selected file.

View File

Displays the View Records in Archive File pop-up box for the selected file.

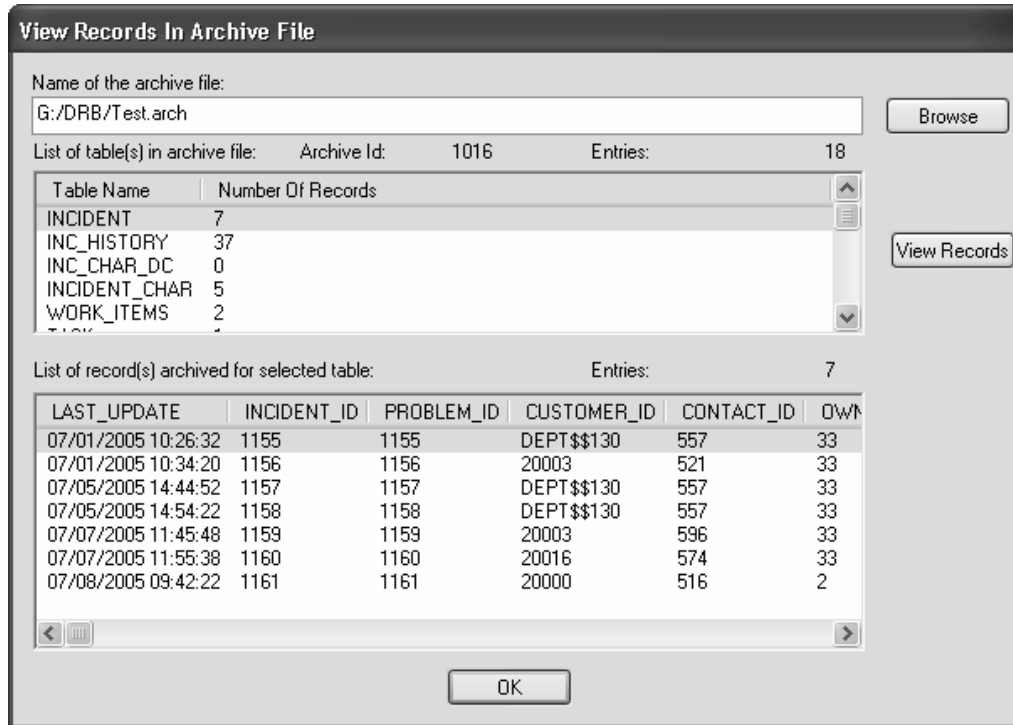
Import

Begins the import process to restore the archived data for the selected file.

View Records in Archive File

This pop-up allows the user to view the records that have been archived in each table for the selected file.

Pop-Up Box Layout



Pop-Up Box Elements

Name of the archive file

The name of the selected archive file.

List of table(s) in archive file

Displays a list of the tables where a record will be archived.

Entries

The number of tables displayed in the list box.

View Records button

When first clicked, displays the tables that have archived records for the selected file. When clicked a second time, displays the archived records for the selected table.

List of records(s) archived for selected table

Displays a list of the records that will be archived for the selected table.

Entries

The number of records displayed in the list box.

Pop-up Button Controls

OK

Closes the pop-up box.

Section 15

**Usage Monitoring &
Administrative Queries**

Section 15

Usage Monitoring & Administrative Queries

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User and License Information Panel

This panel displays the users that are currently logged into the system, how many licenses are being used, and which processes are being used.

From this panel you can disconnect a user from the system if you have ADMIN access to the panel. This allows an administrator to disconnect a user from *CustomerFirst* or *SalesFirst*. A warning message will be displayed for the user being disconnected.

In addition, if all available licenses are being used, you can use the ADMUSER.exe to access the User and License Information panel.

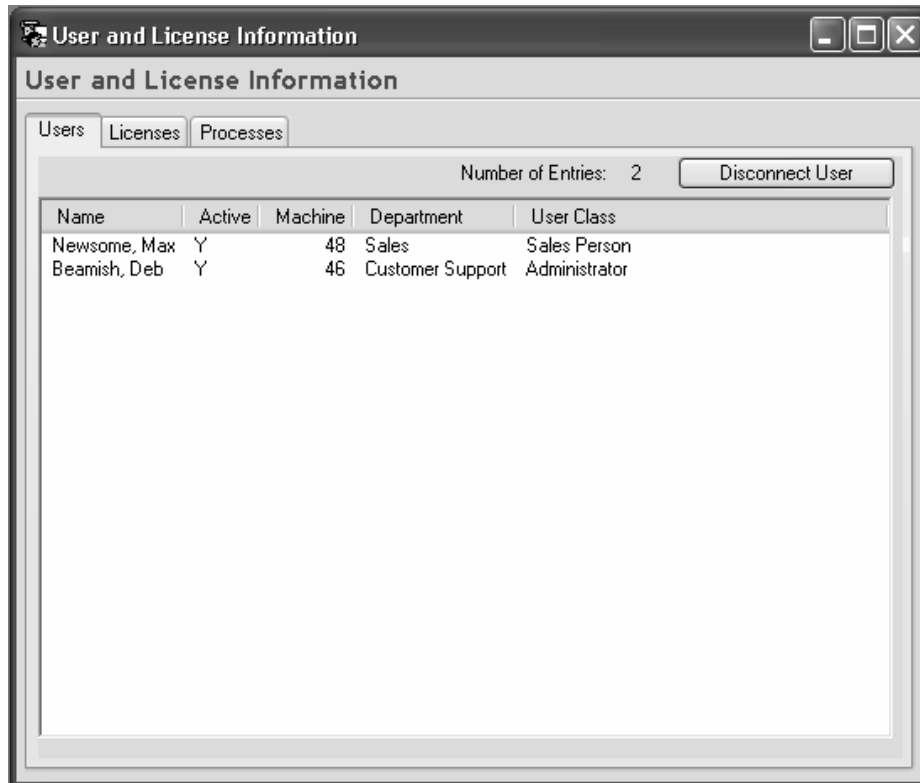
Access

To access this panel select *Administration* and *User and License Info* from the menu bar.

Users Tab

This tab displays a single entry for every user currently logged into the system. Users who have not properly exited from the system (e.g. system crash) may also have their respective entries displayed on this tab.

Panel Layout



Panel Elements

List Box

Displays a list of the users currently logged into the system.

Number of Entries

The number users currently logged into the system.

List Box Button Controls

Disconnect User

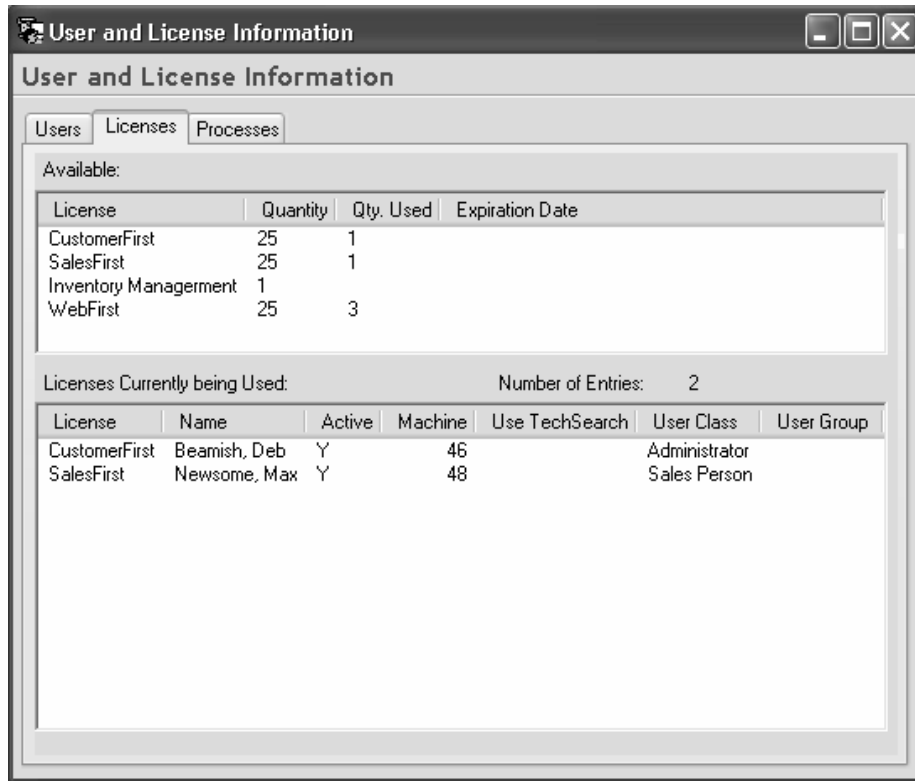
This button is only displayed if the current user has ADMIN security for this panel. When the user clicks this button, a message is displayed asking if they wish to disconnect the user selected in the list box. If the *Yes* button is clicked, the user is disconnected. If the *No* button is clicked, the user is not disconnected.

When this button is clicked, the user highlighted in the list box will be disconnected from *CustomerFirst* and/or *SalesFirst*. The related licenses are made available immediately. A warning message will be displayed for the user being disconnected.

Licenses Tab

This tab provides information about how many licenses you have and the licenses currently being used by the users logged into the system. Since a user may be using multiple licensed products concurrently, an individual may have more than one entry on this tab.

Panel Layout



Panel Elements

Available list box

Displays a list of the licenses that you currently have and how many are being used by licensed product. If you have a temporary license key for a product, the *Expiration Date* of that license key is displayed. If you have a license key for *WebFirst*, the *Qty. Used* column indicates how many accounts have a *Web Password* defined.

Licenses Currently being Used

Displays a list of the licenses currently being used.

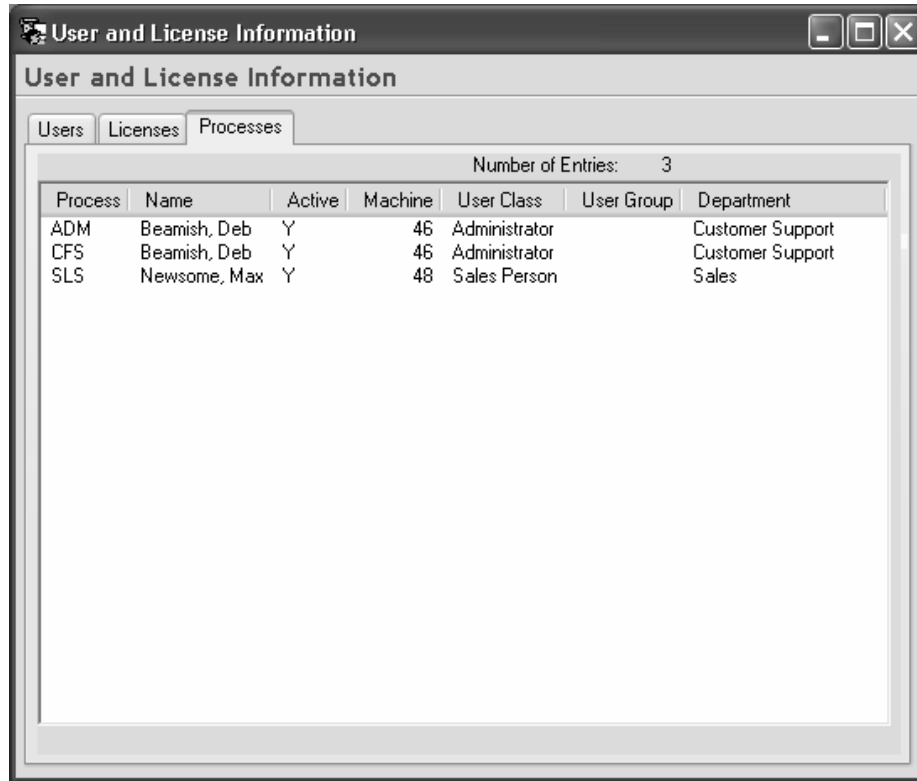
Number of Entries

The number of licenses currently being used.

Processes Tab

This tab displays all the active application processes currently being used. These processes include, but are not limited to, the licensed applications shown on the licenses tab.

Panel Layout



Number of Entries: 3

Process	Name	Active	Machine	User Class	User Group	Department
ADM	Beamish, Deb	Y	46	Administrator		Customer Support
CFS	Beamish, Deb	Y	46	Administrator		Customer Support
SLS	Newsome, Max	Y	48	Sales Person		Sales

Panel Elements

List Box

Displays the application processes currently being used.

Number of Entries

The number of application processes currently being used.

Administrative Queries

The system provides a number of online queries to be used for administrative purposes.

The query results can be customized by each user within the list box. Refer to the List Box section of the *CustomerFirst* or *SalesFirst* Reference manual for additional information.

In addition, one or more forms can be created to customize the printed output. Refer to the Forms section of the *CustomerFirst* or *SalesFirst* Reference manual for additional information.

Menu Bar Choices

Queries

Ad-hoc Search > Audit Trail Search
 File Download Search
 WebFirst Login Search

Layout Changes
List of all Forms

Ad-hoc Search/Audit Trail Search

Displays the Audit Trail Search panel. This search allows the user to find a list of all changes to each table that is marked for audit purposes.

Ad-hoc Search/File Download Search

Displays the File Download Search panel. This search allows the user to find a list of all files that were downloaded.

Ad-hoc Search/WebFirst Login Search

Displays the *WebFirst* Login Search panel. This search allows the user to find a list of all accounts and contacts that logged into *WebFirst*.

Layout Changes

Displays the Layout Changes panel. This search provides the user with a list of all panel customizations for each panel by *User Group*.

List of all Forms

Displays the List of all Forms panel. This search provides the user with a list of all the forms that have been defined for each panel in the system.

Ad-hoc Searches

The ad-hoc searches allow a user to search for a specific type of object based on criteria selected by the user. Each search panel has one or more criteria tabs and a results tab. For many of the searches specific actions can be taken related to the items returned in the search results. A user can also view the SQL used to run the specific query.

Selecting Criteria

The selection criteria for a search are defined on one or more criteria tabs within each ad-hoc search panel. You can use one or more of the available fields. You can select one or more values in the standard drop down fields. Typically this means the drop down fields that have an arrow rather than a custom control.

When the search is performed, the system will use 'And' logic between the fields that you selected, and 'Or' logic between the values selected within the same field.

Some of the searches contain date range fields.

- If you want to see items for a specific day, you would enter that date as the first and second date of the date range. For example, to see all incidents opened on June 1, 2005 enter 6/1/2005 as the first and second date in the date range.
- If you want to see items from one day through another day, you would enter each date in the first and second date of the date range respectively. For example, to see all incidents opened from June 1, 2005 through June 30, 2005 enter 6/1/2005 as the first date in the date range and 6/30/2005 in the second date.
- If you want to see items beginning with a specific day, you would enter that date as the first date of the date range and leave the second date blank. For example, to see all incidents opened from June 1, 2005 enter 6/1/2005 as the first date in the date range.
- If you want to see items up through with a specific day, you would enter that date as the second date of the date range and leave the first date blank. For example, to see all incidents opened through May 31, 2005 enter 5/31/2005 as the second date in the date range.

Saving the Criteria

The selection criteria for a specific query can be saved so that it can be used again. The query must be named and can be saved as a 'Private' or 'Public' query. The selection criteria can be changed for an existing query and the existing query can be saved.

Save New Query

Displays the Save Query pop-up box to save the current query as a new saved query.

Save Query

Saves the criteria changes to the existing saved query.

Search Results

The search results can be customized within the list box. Refer to the List Box section of the *CustomerFirst* or *SalesFirst* Reference manual for additional information.

You can open an item in the search results by double clicking on the item in the list box.

In addition, one or more forms can be created to customize the printed output. Refer to the Forms section of the *CustomerFirst* or *SalesFirst* Reference manual for additional information.

The results can be copied to another file using the *Copy* menu option. Refer to the List Boxes section of the *CustomerFirst* or *SalesFirst* Reference manual for additional information.

The specific search results cannot be saved within the system.

SQL Used to Run the Query

A *Display SQL for Query* menu option is available from each ad-hoc search. This allows you to copy the SQL used to generate the results of the specific query, make changes, and use it in the new RTI SQL Search or through the standard database SQL query tools.

Save Query Pop-Up Box

This pop-up box allows the user to save the criteria selected on a search panel so that it can be used again at a later time. Note that when you save a query you are only saving the selection criteria and not the query results.

Pop-Up Box Layout

Pop-Up Box Elements

Name (RTI_Query.Query_Name)
The name of the saved query. This field is required.

Owner (RTI_Query.Owner_Id)
The name of the person that owns the query. If the query is 'Private' only the user that owns the query or a person with Admin access to the search can see/use the query.

Security (RTI_Query.Private_Query)
If *Public* is selected, any user can access the saved query. If *Private* is selected, this query will only be available to the user who created the query or users with Administrative access to the particular search panel.

Description (RTI_Query.Description)
The description of the query. Can be used to describe the selection criteria to make it easier for other users.

Misc. 1-5 (RTI_Query.Misc1-5)
User defined miscellaneous text fields to provide additional information about the query.

Misc. Drop.1-2

(RTI_Query.Misc_Dropdown1_Id

User defined miscellaneous drop down fields to provide additional information related to the license. Valid values are defined on the Maintain Codes/Code Types panel for Query_Misc_1-2_Id.

Pop-up Button Controls**OK**

Saves the criteria selected on the search panel using the *Name* entered.

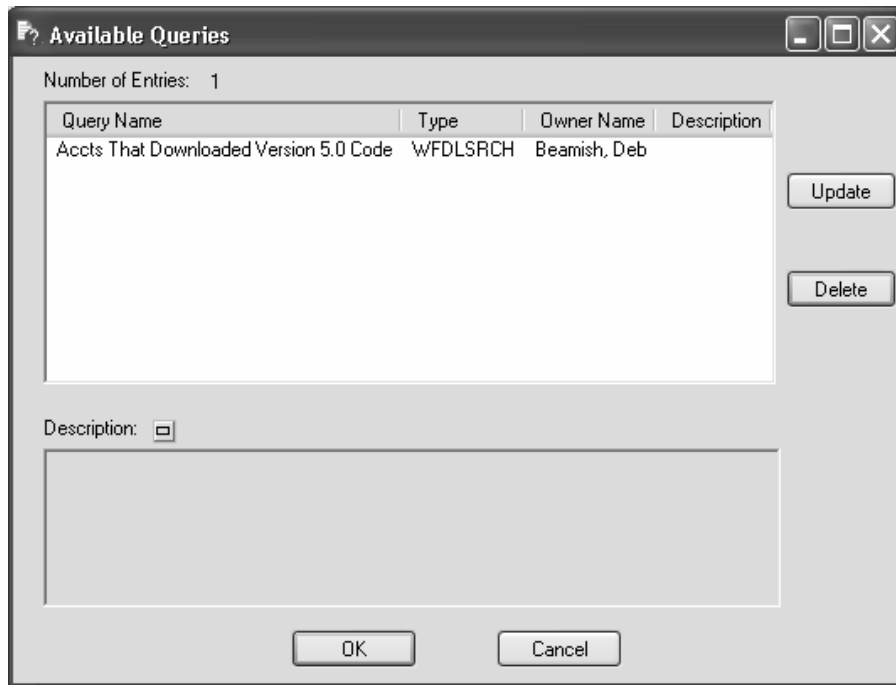
Cancel

Closes the Save Query pop-up box without saving any information.

Available Queries Pop-Up Box

This pop-up box allows the user to use an existing saved query. If a query is marked 'Private', only the user who saved the query and users with Administrative access to the specific search panel can use the query. If a query is marked 'Public', all users that have access to the search panel can use the query.

Pop-Up Box Layout



Pop-Up Box Elements

Available Queries list box (RTI_Query.Query_Name)

Displays a list of the queries that have been saved and that are available for use by the current user. This list only contains the saved queries related to the specific search panel.

Number of Entries

The total number of saved queries that are displayed in the list box.

Related Information

Based on which item in the list is selected, related information is displayed.

Description (RTI_Query.Description)

The description of the query.

List Box Button Controls**Update**

Displays the Save Query pop-up box to allow the user to update information about the saved query.

Delete

Deletes the saved query selected from the list box.

Pop-up Button Controls**OK**

Displays the search panel with the saved criteria from the query.

Cancel

Closes the Available Queries pop-up box and does not open the saved query.

Audit Trail Search

This query allows you to search for changes that have been made to specific columns in tables in the RTI database using the selection criteria available on the criteria tab. For example, you may want to know who updated the *Account Name* for a specific account.

You must indicate which tables should be audited in order for audit records to be created when updates are made. The Audit Trail Search performs the search against these audit records. Refer to the Other Administrative Functions section of this manual for additional information about indicating which tables should be audited.

Access

To access this panel select *Queries* and *Ad-hoc Search* and *Audit Trail Search* from the menu bar.

Menu Bar Choices

Audit Trail Search ---

Open Query
Save New Query
Save Query

Open Query

Displays the Available Queries pop-up box for the user to select an existing saved query.

Save New Query

Displays the Save Query pop-up box to save the current query as a new saved query.

Save Query

Saves the criteria changes to the existing saved query.

Common Panel Elements

Button Controls

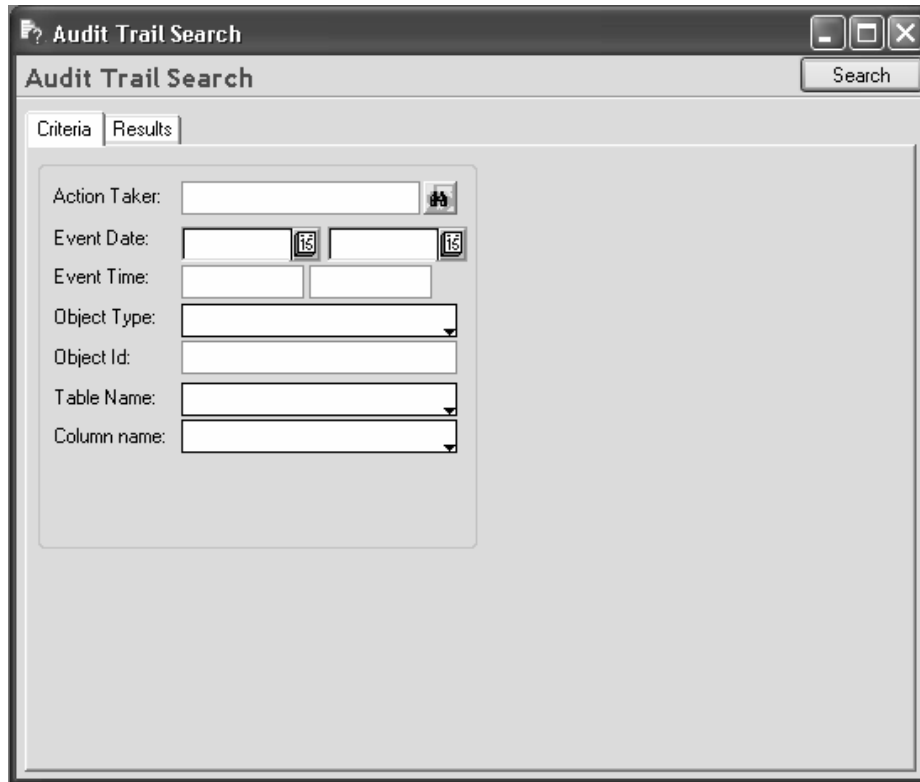
Search

Performs an audit trail search using the selected criteria.

Criteria Tab

This tab contains all of the search criteria for the Audit Trail Search.

Panel Layout



Panel Elements

Action Taker (RTI_Table_History.Action_Taker_Id)
The user that took the action to change the data.

Event Date (RTI_Table_History.Event_Date)
The date range that the change was completed by the Action Taker.

Event Time (RTI_Table_History.Event_Time)
The time range that the change was completed by the Action Taker.

Object Type
The type of object to which a change was made (i.e. Contact, Account, Incident, Problem, License, Maintenance Contract).

Object Id
The unique identifier of the *Object Type*.

Table Name (RTI_Column.Table_Id)
The name of the table to which the change was made.

Column name

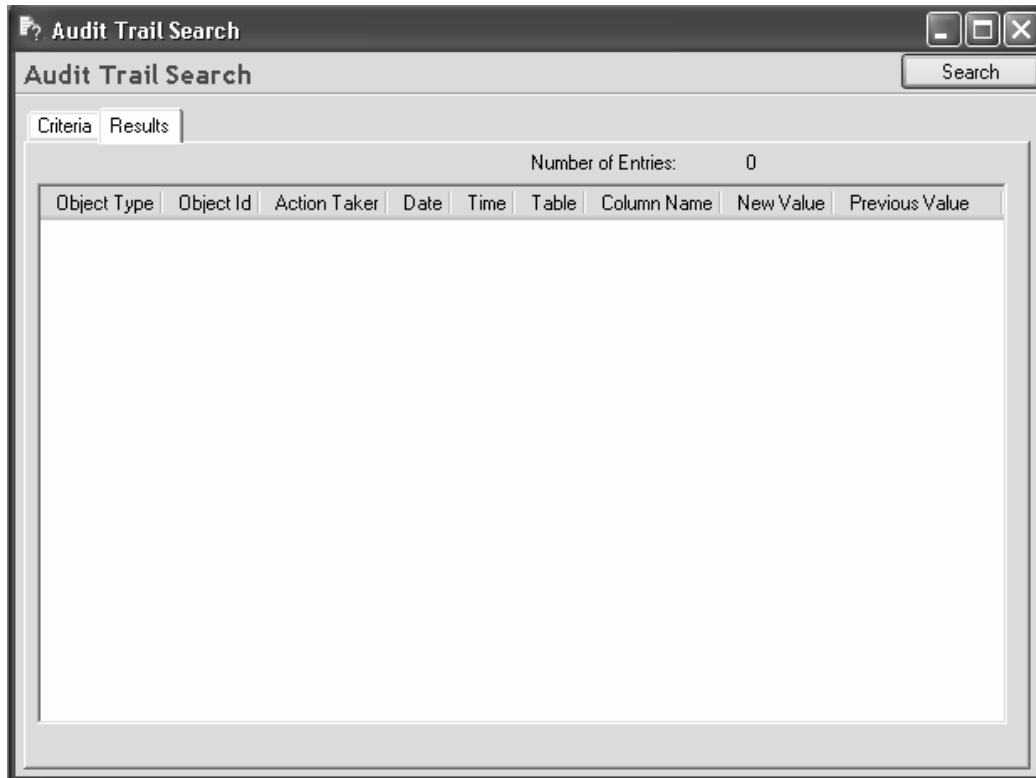
(RTI_Column.Column_Name)

The name of the column to which the change was made. If a *Table Name* is selected, this field is filtered accordingly.

Results Tab

This tab displays a list of the table and column changes that met the selection criteria.

Panel Layout



Panel Elements

List Box

Displays a list of the audit records that meet the selection criteria. Each user can customize the list box to display the data differently if appropriate.

Number of Entries

The number of audit records in the list.

File Download Search Panel

This query allows you to identify who has downloaded files that were provided to users through the File Download Manager. This includes accounts using *WebFirst* as well as people using *CustomerFirst* and *SalesFirst*.

Access

To access this panel select *Queries* and *Ad-hoc Search* and *File Download Search* from the menu bar.

Menu Bar Choices

File Download Search

Open Query
Save New Query
Save Query
Display SQL for Query

Open Query

Displays the Available Queries pop-up box for the user to select an existing saved query.

Save New Query

Displays the Save Query pop-up box to save the current query as a new saved query.

Save Query

Saves the criteria changes to the existing saved query.

Display SQL for Query

Displays the SQL Statement for Query panel to allow the user to view the SQL used to run the specific query.

Button Controls

Search

Performs a search for the users who have downloaded files that were provided through the File Download Manager using the selected criteria.

Criteria Tab

This tab contains the search criteria related to the files that have been downloaded from users in *CustomerFirst* and *SalesFirst* as well as accounts who have logged into *WebFirst*.

Panel Layout

Panel Elements

Account (WFS_DL_History.Customer_Id)
The name of the account that downloaded the file.

Account ID (WFS_DL_History.Customer_Id)
The unique identifier of the account that downloaded the file.

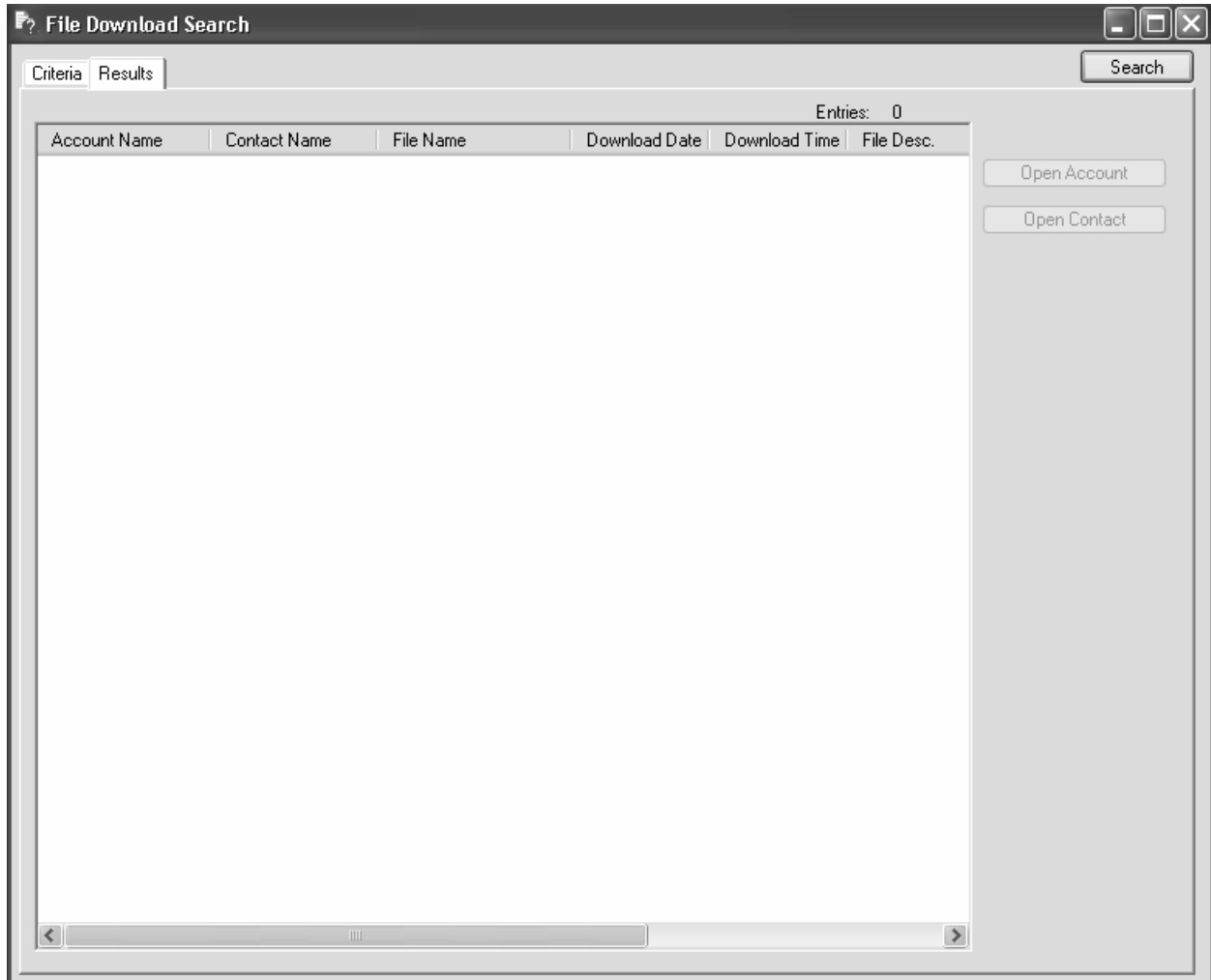
Contact (WFS_DL_History.Contact_Id)
The name of the contact that downloaded the file.

- Parent Acct.** (Customer_Csm.Parent_Cust_Id)
The parent account for one or more accounts. If selected, downloads for accounts associated with the *Parent Account* are returned in the results.
- Reseller Acct.** (Customer_Csm.Reseller_Cust_Id)
The reseller account for one or more accounts. If selected, downloads for accounts associated with the *Reseller Account* are returned in the results.
- Acct. Type** (Customer_CSM.Customer_Type_Id)
The type of account.
- Department** (WFS_DL_History.Department_Id)
The department to which the user belongs that downloaded the file(s).
- Person** (WFS_DL_History.Person_Id)
The person that downloaded the file(s).
- Source** (WFS_DL_History.DL_Source_Id)
The application used to download the file. Valid values are *WebFirst* or *CustomerFirst* or *SalesFirst*.
- Download Date** (WFS_DL_History.Download_Date)
The date range for which the download took place.
- Download Time** (WFS_DL_History.Download_Time)
The time range for which the download took place.
- Ignore (checkbox)**
If checked, any selection made in the *Tree Structure* will be ignored for search purposes.
- Tree Structure**
Displays a list of all the files that are available for download purposes. If the *Ignore* checkbox is checked, any selection made in the tree structure will be ignored for search purposes.
- Files In History**
Allows you to search based on a file that was previously downloaded but can no longer be downloaded.

Results Tab

This tab displays a list of the accounts, contacts, and/or users that have downloaded files based on the criteria selected.

Panel Layout



Panel Elements

List Box

Displays a list of the accounts and/or internal users that have downloaded files and the files downloaded based on the criteria selected. Each user can customize the list box to display the data differently if appropriate.

Entries

The number of files displayed in the list box.

List Box Button Controls**Open Account**

Opens the Account Information panel for the account related to the item selected in the list box.

Open Contact

Opens the Account Contact panel for the contact related to the item selected in the list box.

WebFirst Login Search Panel

This query allows you to identify who has logged into *WebFirst*, when they logged in, and for how long they were logged in.

Access

To access this panel select *Queries* and *Ad-hoc Search* and *WebFirst Login Search* from the menu bar.

Menu Bar Choices

WebFirst Login Search

Open Query
Save New Query
Save Query
Display SQL for Query

Open Query

Displays the Available Queries pop-up box for the user to select an existing saved query.

Save New Query

Displays the Save Query pop-up box to save the current query as a new saved query.

Save Query

Saves the criteria changes to the existing saved query.

Display SQL for Query

Displays the SQL Statement for Query panel to allow the user to view the SQL used to run the specific query.

Button Controls

Search

Performs a search for the people who logged into *WebFirst* using the selected criteria.

Criteria Tab

This tab contains the search criteria related to the accounts who have logged into *WebFirst*.

Panel Layout

Panel Elements

Date (WFS_Login_History.Login_Date)
The date range when the person logged into *WebFirst*.

Time (WFS_Login_History.Login_Time)
The time range when the person logged into *WebFirst*.

Login Type (WFS_Login_History.User_Type_Flag)
The type of login used to access *WebFirst*. Valid selections are 'Account', 'Contact', and 'Admin'. If 'Ignore' is selected, the search will not use the *Login Type* as a criterion.

Account (WFS_Login_History.Customer_Id)
The name of the account logged into *WebFirst*.

Account ID (WFS_Login_History.Customer_Id)
The unique identifier of the account logged into *WebFirst*.

Contact

(WFS_Login_History.Contact_Id)

The name of the contact logged into *WebFirst*.**Parent Acct.**

(Customer_Csm.Parent_Cust_Id)

The parent account for one or more accounts. If selected, WFS access for accounts associated with the *Parent Account* are returned in the results.**Reseller Acct.**

(Customer_Csm.Reseller_Cust_Id)

The reseller account for one or more accounts. If selected, WFS access for accounts associated with the *Reseller Account* are returned in the results.**Acct. Type**

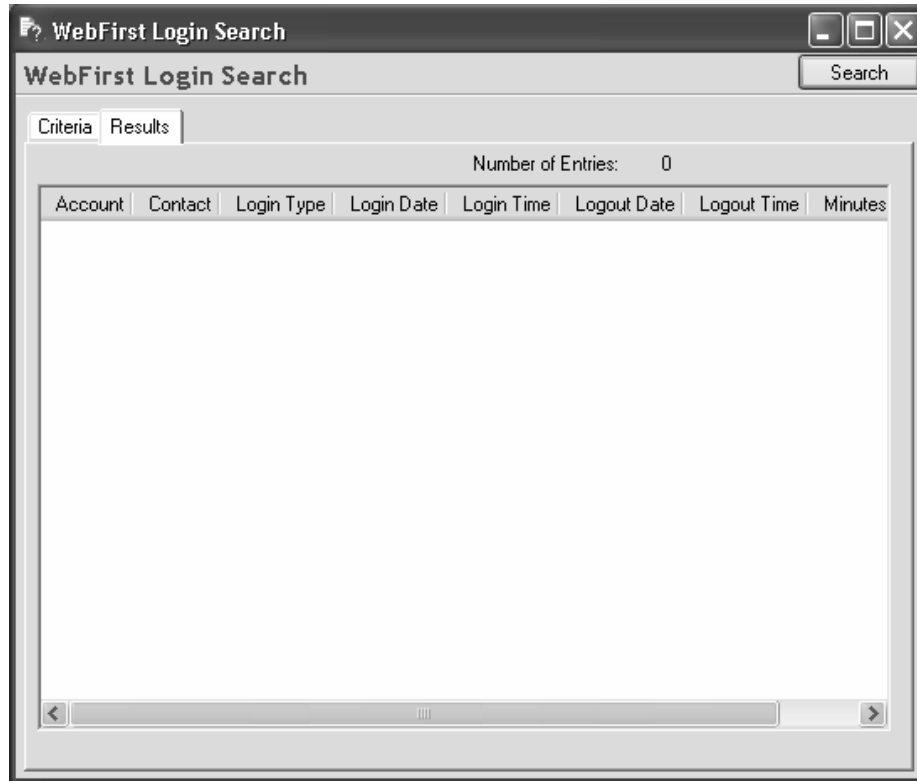
(Customer_CSM.Customer_Type_Id)

The type of account.

Results Tab

This tab displays a list of the accounts and contacts that logged into *WebFirst* based on the criteria selected.

Panel Layout



Panel Elements

List Box

Displays a list of the accounts and contacts that logged into *WebFirst* based on the selection criteria. Each user can customize the list box to display the data differently if appropriate.

Number of Entries

The number of items displayed in the list box.

Layout Changes Panel

This query allows you to view a list of all the screen customizations that have been made for each user group.

Access

To access this panel select *Queries* and *Layout Changes* from the menu bar.

Menu Bar Choices

Layout Changes

Search F9
Delete Customization

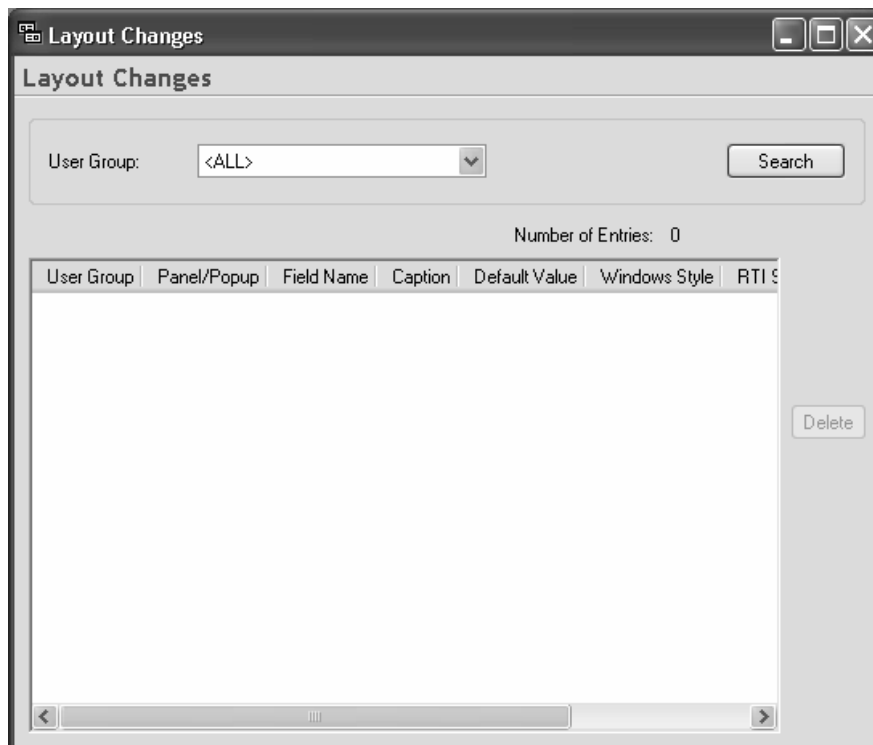
Search F9

Performs the search using the selected criteria.

Delete Customization

Deletes the customization(s) selected in the list. This menu option is disabled if there are no screen customizations in the list.

Panel Layout



Panel Elements

User Group

The user group for which you want to search for screen customizations. A value of '<All>' is available if you wish to search for all screen customizations for all user groups.

List Box

Displays a list of the screen customizations that have been completed for the selected *User Group*.

Number of Entries

Displays the number of customizations in the list.

Columns

Caption

Displays the new field label if the label was modified.

Windows Style

Identifies if the field is visible or hidden, and disabled or enabled.

RTI Style

Identifies if the field is required, added from another tab, or a hidden column in a list box.

List Box Button Controls

Delete

Deletes the customization(s) selected in the list. This button is disabled if there are no screen customizations in the list.

Panel Button Controls

Search

Performs a layout changes search for the selected *User Group*.

List of all Forms Panel

This query allows you to view a list of all forms, both Print and E-mail, in the database. You can perform this search for all public forms, all private forms, or for both.

Access

To access this panel select *Queries* and *List of all Forms* from the menu bar.

Panel Layout

Form ID	Form Type	Form Target	Form Name	Default	Private	Format Separately	Delete
---------	-----------	-------------	-----------	---------	---------	-------------------	--------

Panel Elements

Select Forms to show

Indicates whether you want to see the 'Public' forms, the 'Private' forms, or all forms.

List Box

Displays a list of the forms based on the selection in the *Select Forms to show* field.

Number of Entries

Displays the number of forms in the list.

Columns**Form Target**

The panel or pop-up box for which the form was created.

Default

Indicates that this form is an RTI defined form.

List Box Button Controls**Delete**

Deletes the form(s) selected in the list. This button is disabled if there are no forms in the list.

Panel Button Controls**Search**

Performs a search for the forms identified in the *Select Forms to show* field.

Section 14

Data Imports

Section 14

Data Imports

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Import Utility

The Import Utility provides standard import programs that allow you to import key data from flat files. Depending on the specific import one or more of the following will be available:

- Perform a New import (This is typically the system default)
Import records will be processed as new records.
- Perform a New/Re-import
Import records may be processed as new records or as updates to existing records.
- Perform a Re-import
Import records will be processed as updates to existing records.

The import utility will prompt you to complete the following steps:

- Choose the import to run
- Select your import file
- Select import options
- Identify your import file layout
- Preview the import data
- Select additional import options
- Run the import

Order of Imports

If you are using more than one type of import it may be important in which order they are run. For example if you are importing product information and licenses, the Product Import should be run before the License Import.

Refer to the Overview Section of this manual for a discussion of the sequence for defining tables. For example, before you can import problems, the codes used by the problem must be defined as well as products.

Login

When you execute the *CustomerFirst* Import utility (RTIIMP.exe), a logon pop-up box is displayed.

Import File

You can import a text file or an XML file. If a Microsoft Excel file is being used, it should be saved as a .CSV file for importing purposes.

Importing Date and Time Fields

When importing a date, the system will use the date format that the user has selected on the Select Import File panel of the Import Wizard.

Since time is stored and displayed based on a 24 hour clock in the system, the import converts the time from the import file so that the import file does not have to be in a 24 hour clock format. For example, a time field can appear in the import file at 2:28 PM but when it is imported and displayed in the system, it appears as 14:28.

When performing an import and a date and/or time is required, in most cases the current date is used and a time of 12:00:00 is assumed.

Importing Code Value Fields

When importing data for a field where the valid values are defined in Maintain Codes/Code Types, you can use the predefined *Long Value* or the predefined *Short Value* for a specific field value.

Input File Format

Each record in the import file should be terminated with a new line character. Even if a field is blank, you still need to use a delimiter (i.e. comma) to specify the field. Fields can be enclosed in double quotes, but this is not normally required. If a field contains a comma, or a new line character, or a double quote, the field must be enclosed in double quotes. If a field contains a double quote, it must be represented as two consecutive double quotes. When a record is inserted into the database, the consecutive two double quotes will be changed to a single double quote, but all new line characters or commas will still be in the field.

In order to blank out the data for an existing field, you must enter two double quotes for the field value. It would appear as `,""`, in the import file. You cannot make required fields blank.

Files Created During the Import Process

The following describes the files that are created during the import process.

Import Data before Editing (.itr)

When the user uses the column header mapping (discussed later in this section) in the Import Wizard, a new file is created. This file is called `<import file name>.itr` file. This file is stored in the directory where the import file is located. This file contains only the data in the import file without the column headers. All data is enclosed in quotation marks.

Import Data after Editing (.rpl)

If the user edits the import file while using the Import Wizard (such as adding a new column), a new file is created. This file is called `<import file name>.rpl` file. This file is stored in the directory where the import file is located. This file can be used any time in the future if the user wishes to make additional changes to the file and use that as the import file.

Rejected Records (.rej)

If there is any type of error in the import, it will be recorded in the RTIIMP.log file. This log file is currently placed in the directory where the data file is located.

If there is an error in a specific record that is being imported, such as the data for a drop down field cannot be identified, the record is rejected. Rejected records are displayed in the main window of the RTIIMP.exe. and are captured in the <import file name>.rej file. This file is stored in the directory where the import file is located. You can open this file as a text document, make the changes to the rejected records, and import the data again using this file.

Template File (.tpc)

A .tpc file is created that identifies the selections made on the Choose Layout panel. The file name is the same name as the import file <<import file name>>.tpc. It is stored in the directory that contains the RTIIMP.exe executable that you are running. A .tpc file can be used in other imports. The file can be selected in the *Select Template File* field on the Select Import File panel.

Log File

The import utility creates a log file called rtiimp.log. It can be found in the directory that contains the RTIIMP.exe executable that you are running. The log file contains warnings and errors associated with the import.

Menu Bar Choices

File	View	Help
Start Import Wizard Exit	Import F <u>i</u> elds	<u>A</u> bout

File/Start Import Wizard

Displays the Import Wizard to allow the user to begin the import process.

File/Exit

Closes the Import Utility.

View/Import Fields

Displays the View Import Fields pop-up box to allow the user to select a specific import and view the list of the fields available to import.

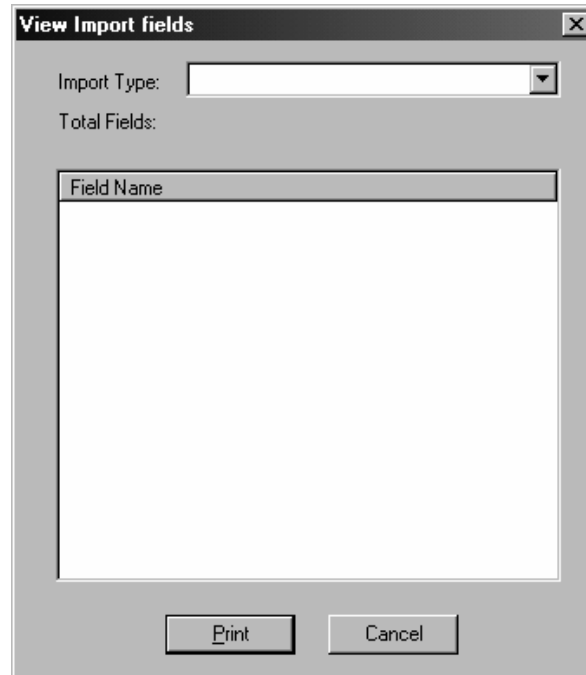
Help/About

Displays the About *CustomerFirst* Import pop-up box to allow the user to view which release of *CustomerFirst* is being run.

View Import Fields Pop-Up Box

This pop-up box allows the user to view a list of the fields that are available as part of the specified import.

Pop-Up Box Layout



Pop-Up Box Elements

Import Type

The name of the import file for which the import fields will be displayed.

Total Fields

The total number of fields available in the import displayed in the list box.

List Box

Displays a list of all the import fields for the import selected in the *Import Type* field.

Pop-up Button Controls

Print

Displays the Printer Specifications pop-up box to allow the user to select where the list of fields should be printed.

Cancel

Closes the View Import Fields pop-up box.

Standard Import Programs

The following standard import programs are available. It is identified for each import whether data can be re-imported for existing records.

- Account (can be re-imported)
- Account and Contact (can be re-imported)
- Characteristic Value (**cannot** be re-imported)
- Contact (can be re-imported)
- Contact Activity (**cannot** be re-imported)
- Contact Type (**cannot** be re-imported)
- Equipment (can be re-imported)
- Incident & Problem (**cannot** be re-imported)
- Incident History (**cannot** be re-imported)
- License (can be re-imported)
- Maintenance Contract (**cannot** be re-imported)
- Personnel (can be re-imported)
- Problem Only (**cannot** be re-imported)
- Problem History (**cannot** be re-imported)
- Product (can be re-imported)
- Sales Opportunity (**cannot** be re-imported)
- Sales Opportunity History (**cannot** be re-imported)
- Shipment (can be re-imported)

Account Import

The Account Import allows you to load specific data from a file for new or existing accounts. This import can be run in two different ways:

- **New Import** (This is the default)
Import records will be processed as new records.
- **New/Re-import** ('Perform re-import' option)
Import records may be processed as new records or as updates to existing records.

Tables Used in this Import

- Customer
- Customer_CSM
- Customer_Type
- Address
- Department
- Personnel
- Codes
- Cont_Source

Options

- An *Update Address information if match is found* option is available on the Other Import Options screen in the Import Wizard. If this option is selected, the account address lines will be updated if the *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options match to an existing account, and new information is provided in the import file.

This option is ignored for the specific record if a *Customer Id* or *Source Customer Id* is provided in the import file. The address information will be updated if new information is provided in the import file.

- A *Check for existing accounts in* option is available on the Other Import Options screen in the Import Wizard. This allows you to indicate if the same *Country*, same *State/Prov*, and/or same *City* should be used with the *Compressed Name* when the system is looking for an existing account during the import process. The *Same State/Prov* and *Same City* are checked by default. If none of these are checked, only the *Compressed Name* will be used.

This option is ignored for the specific record if a *Customer Id* or *Source Customer Id* is provided in the import file.

Looking for an Existing Account With the Same Name

The *Compressed Name* for the account is used when searching for similar account names. The values defined in the *Remove_BegChar_Id* field and the *Remove_EndChar_Id* field in *Maintain Codes and Code Types* are removed from the beginning or end of the *Account Name* when creating the *Compressed Name*.

The following characters are automatically removed from the name: Apostrophe, Period, Semicolon, Exclamation, and Asterisk. The space for the apostrophe and period characters are also removed. Commas are replaced with a space. The values defined for Remove_BegChar_Id field in Maintain Codes/Code Types are then removed from the *Account Name* if followed by a space. Values defined for Remove_EndChar_Id field are removed from the *Account Name* if preceded by a space. All additional punctuation, special characters, and spaces are then removed and the case of the *Compressed Name* is ignored.

For example, if there is an existing account named Hanover Systems, Inc. and a new account is added named Hanover Systems Incorporated or Hanover Systems Company, the names would be compared as Hanover Systems and a match would be found.

This does not occur for the specific record if a *Customer Id* or *Source Customer Id* is provided in the import file.

Import Processing

Using the New Import Facility

- If the *Customer_Id* is in the import file, and an account with this *Customer_Id* does not already exist, a new record is added. If the *Customer_Id* is in the import file, and an account with this *Customer_Id* already exists, the import record is rejected.
- If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, and an account with this *Source_Cust_Id* does not already exist, a new record is added. If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, and an account with this *Source_Cust_Id* already exists, the import record is rejected.
- If neither the *Customer_Id* nor *Source_Cust_Id* is provided, the import program searches for an existing account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no match is found, a new record is added. If an existing account is found, the import record is rejected.

Using the New/Re-Import Facility

- If the *Customer_Id* is in the import file and an account with this number already exists, that account will be used.
- If the *Customer_Id* is in the import file and an account with this number does not already exist, the import program searches for an existing account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no record is found, a new account record is added. If a match is found, a new account record is added and a warning message is provided in the log file.
- If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, if a single account with this *Source_Cust_Id* already exists, that account will be used. If multiple matches are found in the database, the record is rejected.
- If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, if an account with this *Source_Cust_Id* does not already exist, the import program searches for an

existing customer with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no record is found, a new account record is added. If a match is found, a new account record is added and a warning message is provided in the log file.

- If neither the *Customer_Id* nor *Source_Cust_Id* is provided, but the account *Name* is provided, if a single account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options already exists, that account will be used. If multiple matches are found in the database, the record is rejected.
- If neither the *Customer_Id* nor *Source_Cust_Id* is provided, but the account *Name* is provided, if an account with this name does not exist, a new account record is added.
- If neither the *Customer_Id*, nor *Source_Cust_Id* or account *Name* is provided, the record is rejected.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Billing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Billing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for *Address_Misc1-2_Id* from the Codes table.

Billing_Address.State

If filled and it contains a valid two character US state abbreviation, the *Billing_Address.Time_Zone* field will be populated with the appropriate value from the Codes table.

Billing_Address.Time_Zone

If filled, must contain a valid value for *Time_Zone_Id* from the Codes table.

Customer.Active_Flag

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Customer.Customer_Id

If this is left blank, a Customer Id will be assigned by the system when importing a new customer record. See the Import Processing section above for additional information.

Customer.Customer_Name

This is a required field when importing a new customer. See the Import Processing section above for additional information.

Customer.Lead_Source

If filled in, each level of the lead source hierarchy must be separated by a pipeline (|) character. It is not necessary to include 'All Leads' in the hierarchy.

Customer.Sales_Person

If filled in, must uniquely identify a sales person who is defined in the Personnel table with a *User Class* of 'Salesperson'. The last name can be used by itself if it is unique. If first name is specified, it must be represented as *Last_Name*, *First_Name*.

Customer.Sales_Region

If filled in, must contain the name of an active department in the Department table. The department identified must have a department type with an Internal Value of 'Sales'.

Customer_Csm.Act_Status

If filled in, must contain a valid value for Act_Status_Id from the Codes table.

Customer_Csm.Credit_Status

If filled in, must contain a valid value for Credit_Status_Id from the Codes table.

Customer_Csm.Cust_Priority

If filled in, must contain a valid value for Priority_Id from the Codes table.

Customer_Csm.Customer_Type

If filled in, must contain an active Customer Type from the Customer_Type table.

Customer_Csm.Hdl_Status

If filled in, must contain a valid value for Hdl_Status_Id from the Codes table.

Customer_Csm.Message_End_Date

This field is required if the Special_Message field is being used.

Customer_Csm.Misc1_Cust_Name

If filled in, must contain the name of a valid customer and uniquely identify the customer.

Customer_Csm.Misc_Dropdown1-16

If filled in, must contain a valid value for Customer_Misc1-16_Id from the Codes table.

Customer_Csm.Parent_Cust_Id

If filled in, must contain a valid existing Customer Id.

Customer_Csm.Parent_Cust

If filled in, must contain the name of a valid customer and uniquely identify the customer.

Customer_Csm.Reseller_Cust_Id

If filled in, must contain a valid existing Customer Id. The customer identified must have a Customer Type of 'Reseller'.

Customer_Csm.Reseller_Cust

If filled in, must contain the name of a valid customer. The customer identified must have a Customer Type of 'Reseller'.

Customer_Csm.Sales_Status

If filled in, must contain a valid value for Sales_Status_Id from the Codes table.

Customer_Csm.Sic_Code

If filled in, must contain a valid value for Industry_Code_Id from the Codes table.

Customer_Csm.Source_Cust_Id

This is may be a required field when importing customer information. See the Import Processing section above for additional information.

Customer_Csm.Support_Center

If filled in, it must contain the name of an active department that has been defined in the Department table. The department must have a *Department Type* with an Internal Value of 'CS' or 'Sales'.

Customer_Csm.Web_User_Class

If filled, must contain a valid value for User_Cls_Name_Id from the Codes table that has an Internal Value of 'WFS'.

Customer_Csm.Web_User_Group

If filled in, it must contain a valid value for User_Group_Id from the Codes table. The *User Group* must have an Internal Value of 'WFS'.

Mailing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Mailing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Mailing_Address.State

If filled and it contains a valid two character US state abbreviation, the Mailing_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Mailing_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Shipping_Address.Country_Name

If filled, must contain a valid name from the Country table.

Shipping_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Shipping_Address.State

If filled and it contains a valid two character US state abbreviation, the Shipping_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Shipping_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Account & Contact Import

This import allows you to enter account and contact data at one time. This import can be run in two different ways:

- New Import (This is the default)
All records will be processed as new records.
- New/Re-import ('Perform re-import' option)
Import records may be processed as new records or as updates to existing records.

Tables Used in this Import

- Customer
- Customer_CSM
- Customer_Type
- Address
- Department
- Personnel
- Codes
- Cont_Source

Options

- An *Update Address information if match is found* option is available on the Other Import Options screen in the Import Wizard. If this option is selected:
 - The account address lines will be updated if the account *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options match to an existing account, and new information is provided in the import file.

This option is ignored for the specific record if a *Customer_Id* or *Source_Cust_Id* is provided in the import file. The address information will be updated if new information is provided in the import file.
 - The contact address information will be updated if an existing contact record is found, and new address information is provided in the import file.

This option is ignored for the specific record if a *Contact_Id* is provided in the import file. The address information will be updated if new information is provided in the import file.
- A *Check for existing accounts in* option is available on the Other Import Options screen in the Import Wizard. This allows you to indicate if the same *Country*, same *State/Prov*, and/or same *City* should be used with the *Compressed Name* when the system is looking for an existing account during the import process. The *Same State/Prov* and *Same City* are checked by default. If none of these are checked, only the *Compressed Name* will be used.

This option is ignored for the specific record if a *Customer Id* or *Source Customer Id* is provided in the import file.

Looking for an Existing Account With the Same Name

The *Compressed Name* for the account is used when searching for similar account names. The values defined in the Remove_BegChar_Id field and the Remove_EndChar_Id field in Maintain Codes and Code Types are removed from the beginning or end of the *Account Name* when creating the *Compressed Name*.

The following characters are automatically removed from the name: Apostrophe, Period, Semicolon, Exclamation, and Asterisk. The space for the apostrophe and period characters are also removed. Commas are replaced with a space. The values defined for Remove_BegChar_Id field in Maintain Codes/Code Types are then removed from the *Account Name* if followed by a space. Values defined for Remove_EndChar_Id field are removed from the *Account Name* if preceded by a space. All additional punctuation, special characters, and spaces are then removed and the case of the *Compressed Name* is ignored.

For example, if there is an existing account named Hanover Systems, Inc. and a new account is added named Hanover Systems Incorporated or Hanover Systems Company, the names would be compared as Hanover Systems and a match would be found.

This does not occur for the specific record if a *Customer Id* or *Source Customer Id* is provided in the import file.

Import Processing

Using the New Import Facility

- If the Customer_Id is in the import file, and an account with this Customer_Id does not already exist, a new record is added. If the Customer_Id is in the import file, and an account with this Customer_Id already exists, the account record is rejected.
- If the Customer_Id is not in the import file, but the Source_Cust_Id is filled in, and an account with this Source_Cust_Id does not already exist, a new record is added. If the Customer_Id is not in the import file, but the Source_Cust_Id is filled in, and an account with this Source_Cust_Id already exists, the account record is rejected.
- If neither the Customer_Id nor Source_Cust_Id is provided, the import program searches for an existing account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no match is found, a new record is added. If an existing account is found, the account record is rejected.
- The account for the contact must be uniquely identified. If more than one existing account is found in the database, the contact record is rejected.
- If a contact with the same *First Name* and *Last Name* is found for the account specified, the contact record is rejected.

Using New/Re-Import Facility

- If the Customer_Id is in the import file and an account with this number already exists, that account will be used.

- If the *Customer_Id* is in the import file and an account with this number does not already exist, the import program searches for an existing account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no record is found, a new account record is added. If a match is found, a new account record is added and a warning message is provided in the log file.
- If the *Contact_Id* is in the import file and a contact with this number already exists, that contact and account will be used.
- If the *Contact_Id* is in the import file and a contact with this number does not already exist, the record will be rejected.
- If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, if a single account with this *Source_Cust_Id* already exists, that account will be used. If multiple matches are found in the database, the record is rejected.
- If the *Customer_Id* is not in the import file, but the *Source_Cust_Id* is filled in, if an account with this *Source_Cust_Id* does not already exist, the import program searches for an existing account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options. If no record is found, a new account record is added. If a match is found, a new account record is added and a warning message is provided in the log file.
- If neither the *Customer_Id* nor *Source_Cust_Id* is provided, but the account *Name* is provided, if a single account with the same *Name*, and *Mailing Country*, *Mailing State/Prov*, and/or *Mailing City* as indicated in the import options already exists, that account will be used. If multiple matches are found in the database, the record is rejected.
- If neither the *Customer_Id* nor *Source_Cust_Id* is provided, but the account *Name* is provided, if an account with this name does not exist, a new account record is added.
- If neither the *Contact_Id*, nor *Customer_Id*, nor *Source_Cust_Id* nor account *Name* is provided, the record is rejected.
- If the *Contact_Id* is not provided, the account can be identified, and a contact with the same *First Name* and *Last Name* already exists for the account, that contact will be used.
- If the *Contact_Id* is not provided, the account can be identified as a new account in the import or an existing account, and there is no contact with the same *First Name* and *Last Name* for the account, a new contact record will be added.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Billing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Billing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for *Address_Misc1-2_Id* from the Codes table.

Billing_Address.State

If filled and it contains a valid two character US state abbreviation, the Billing_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Billing_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Cust_Personnel.Active_Flag

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Cust_Personnel.Cust_Person_Id

If filled in for a personnel reimport, this field is used to identify an existing contact.

Cust_Personnel.Default_Contact

If filled in, it indicates whether or not the person is the default contact for the customer. Valid values are 'Y', 'y', 'N', or 'n'. If a contact is indicated as the default contact, the contact cannot be marked as inactive.

Cust_Personnel.First_Name

This is a required field for a new contact record. See the Import Processing section above for additional information.

Cust_Personnel.Last_Name

This is a required field for a new contact record. See the Import Processing section above for additional information.

Cust_Personnel.Lead_Source

If filled in, each level of the lead source hierarchy must be separated by a pipeline (|) character. It is not necessary to include 'All Leads' in the hierarchy.

Cust_Personnel.Misc_Dropdown1-16

If filled in, must contain a valid value for Cust_Cont_Misc1-16_Id from the Codes table.

Cust_Personnel.Suffix

If filled, must contain a valid value for Suffix_Id from the Codes table.

Cust_Personnel.Name_Title

If filled, must contain a valid value for Name_Title_Id from the Codes table.

Cust_Personnel.Web_User_Class

If filled, must contain a valid value for User_Cls_Name_Id from the Codes table that has an Internal Value of 'WFS'.

Customer.Active_Flag

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Customer.Customer_Id

If this is left blank, a Customer Id will be assigned by the system when importing a new customer record. See the Import Processing section above for additional information.

Customer.Customer_Name

This is a required field when importing a new customer. See the Import Processing section above for additional information.

Customer.Lead_Source

If filled in, each level of the lead source hierarchy must be separated by a pipeline (|) character. It is not necessary to include 'All Leads' in the hierarchy.

Customer.Sales_Person

If filled in, must uniquely identify a sales person who is defined in the Personnel table with a *User Class* of 'Salesperson'. The last name can be used by itself if it is unique. If first name is specified, it must be represented as Last_Name, First_Name.

Customer.Sales_Region

If filled in, must contain the name of an active department in the Department table. The department identified must have a *Department Type* with an Internal Value of 'Sales'.

Customer_Csm.Act_Status

If filled in, must contain a valid value for Act_Status_Id from the Codes table.

Customer_Csm.Credit_Status

If filled in, must contain a valid value for Credit_Status_Id from the Codes table.

Customer_Csm.Cust_Priority

If filled in, must contain a valid value for Priority_Id from the Codes table.

Customer_Csm.Customer_Type

If filled in, must contain an active Customer Type from the Customer_Type table.

Customer_Csm.Hdl_Status

If filled in, must contain a valid value for Hdl_Status_Id from the Codes table.

Customer_Csm.Message_End_Date

This field is required if the Special_Message field is being used.

Customer_Csm.Misc1_Cust_Name

If filled in, must contain the name of a valid customer and uniquely identify the customer.

Customer_Csm.Misc_Dropdown1-16

If filled in, must contain a valid value for Customer_Misc1-16_Id from the Codes table.

Customer_Csm.Parent_Cust_Id

If filled in, must contain a valid existing Customer Id.

Customer_Csm.Parent_Cust

If filled in, must contain the name of a valid customer and uniquely identify the customer.

Customer_Csm.Reseller_Cust_Id

If filled in, must contain a valid existing Customer Id. The customer identified must have a Customer Type of 'Reseller'.

Customer_Csm.Reseller_Cust

If filled in, must contain the name of a valid customer. The customer identified must have a Customer Type of 'Reseller'.

Customer_Csm.Sales_Status

If filled in, must contain a valid value for Sales_Status_Id from the Codes table.

Customer_Csm.Sic_Code

If filled in, must contain a valid value for Industry_Code_Id from the Codes table.

Customer_Csm.Source_Cust_Id

This may be a required field when importing customer information. See the Import Processing section above for additional information.

Customer_Csm.Support_Center

If filled in, it must contain the name of an active department that has been defined in the Department table. The department must have a *Department Type* with an Internal Value of 'CS' or 'Sales'.

Customer_Csm.Web_User_Class

If filled, must contain a valid value for User_Cls_Name_Id from the Codes table that has an Internal Value of 'WFS'.

Customer_Csm.Web_User_Group

If filled in, it must contain a valid value for User_Group_Id from the Codes table. The *User Group* must have an Internal Value of 'WFS'.

Full_Contact_Name

If entered, contains the full contact name including both the first name and last name. The text found before the first space is encountered is identified as the *First Name*. The text found after the first space is the contact's *Last Name*.

Group_Name

If filled in, must contain a valid group name for an existing group.

Mailing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Mailing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Mailing_Address.State

If filled and it contains a valid two character US state abbreviation, the Mailing_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Mailing_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Shipping_Address.Country_Name

If filled, must contain a valid name from the Country table.

Shipping_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Shipping_Address.State

If filled and it contains a valid two character US state abbreviation, the Shipping_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Shipping_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Characteristic Value Import

This import allows you to enter characteristic values that are associated with predefined characteristic types. This import is run in the following way:

- **New Import**
Import records will be processed as new records.

Tables Used in this Import

- Char_Type
- Char_Value
- Product
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Char_Type_Name

Must contain a valid Characteristic_Type from the Char_Type table.

Product_Family

If filled in, must contain a valid value for the Product_Family_Id from the Codes table. If both this field and Product_Name are filled in, the record will be rejected.

Product_Name

If filled in, must contain a valid product name from the Product table. If both this field and Product_Family are filled in, the record will be rejected.

Contact Import

The Contact Import allows you to load specific data from a file for new or existing contacts. This import can be run in two different ways:

- New Import (This is the default)
All records will be processed as new records.
- New/Re-import (Perform re-import option)
Import records may be processed as new records or as updates to existing records.

Tables Used in this Import

- Customer
- Customer_CSM
- Cust_Personnel
- Address
- Group_Definition
- Codes
- Cont_Source

Options

- An “Update Address information if match is found” option is available on the Other Import Options screen in the Import Wizard. If this option is selected, the contact address information will be updated if an existing contact record is found, and new address information is provided in the import file.

This option is ignored for the specific record if a *Contact Id* is provided in the import file. The address information will be updated if new information is provided in the import file.

Import Processing

Using New Import Facility

- The account for the contact must be uniquely identified using the *Customer_Id*, *Source_Customer_Id*, or the *Customer_Name*. If a single account cannot be identified in the database, the record will be rejected.
- If a contact with the same *First Name* and *Last Name* is found for the account specified, the record will be rejected.

Using New/Re-Import Facility

- If the Contact_Id is provided in the import file and a contact with this number already exists, that contact will be used.
- If the Contact_Id is provided in the import file and a contact with this number does not already exist, the record will be rejected.
- If neither the Contact_Id, nor Customer_Id, nor Source_Cust_Id is provided in the import file, but the Customer_Name is provided, if a single account with the same *Name*, same *Mailing City* as the *Contact Mailing City*, and same *Mailing State* as the *Contact Mailing State* already exists, that account will be used. If multiple matches are found in the database, the record is rejected.
- If the Contact_Id is not provided, the account can be identified, and a contact with the same *First Name* and *Last Name* already exists for the account, that contact will be used.
- If the Contact_Id is not provided, the account can be identified, and there is no contact with the same *First Name* and *Last Name* for the account, a new contact record will be added.
- If neither the Contact_Id, nor Customer_Id, nor Source_Cust_Id nor Customer_Name is provided, the record is rejected.
- If an existing account cannot be identified the record is rejected.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Billing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Billing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Billing_Address.State

If filled and it contains a valid two character US state abbreviation, the Billing_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Billing_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Cust_Personnel.Active_Flag

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Cust_Personnel.Cust_Person_Id

If filled in for a personnel reimport, this field is used to identify an existing contact.

Cust_Personnel.Default_Contact

If filled in, it indicates whether or not the person is the default contact for the customer. Valid values are 'Y', 'y', 'N', or 'n'. If a contact is indicated as the default contact, the contact cannot be marked as inactive.

Cust_Personnel.First_Name

This is a required field for a new contact record. See the Import Processing section above for additional information.

Cust_Personnel.Last_Name

This is a required field for a new contact record. See the Import Processing section above for additional information.

Cust_Personnel.Lead_Source

If filled in, each level of the lead source hierarchy must be separated by a pipeline (|) character. It is not necessary to include 'All Leads' in the hierarchy.

Cust_Personnel.Misc_Dropdown1-16

If filled in, must contain a valid value for Cust_Cont_Misc1-16_Id from the Codes table.

Cust_Personnel.Suffix

If filled, must contain a valid value for Suffix_Id from the Codes table.

Cust_Personnel.Web_User_Class

If filled, must contain a valid value for User_Cls_Name_Id from the Codes table that has an Internal Value of 'WFS'.

Cust_Personnel.Name_Title

If filled, must contain a valid value for Name_Title_Id from the Codes table.

Customer.Customer_Id

If filled in, it must be a valid existing Customer_Id in the database. Source_Cust_Id and Name are ignored if this field is filled in. If it is not filled in, the Source_Cust_Id or Name must be filled in.

Customer.Customer_Name

If Customer_Id or Source_Cust_Id is filled in, this field is ignored. If used, it must uniquely identify only one customer in the database.

Customer_Csm.Source_Cust_Id

If Customer_Id is filled in, this field is ignored. Otherwise, if it is filled in, it must be able to uniquely identify an existing customer in the database.

Full_Contact_Name

If entered, contains the full contact name including both the first name and last name. The text the is found before the first space is encountered is identified as the *First Name*. The text found after the first space is the contact's *Last Name*.

Mailing_Address.Country_Name

If filled, must contain a valid name from the Country table.

Mailing_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Mailing_Address.State

If filled and it contains a valid two character US state abbreviation, the Mailing_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Mailing_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Shipping_Address.Country_Name

If filled, must contain a valid name from the Country table.

Shipping_Address.Misc_Dropdown1-2

If filled in, it must contain a valid value for Address_Misc1-2_Id from the Codes table.

Shipping_Address.State

If filled and it contains a valid two character US state abbreviation, the Shipping_Address.Time_Zone field will be populated with the appropriate value from the Codes table.

Shipping_Address.Time_Zone

If filled, must contain a valid value for Time_Zone_Id from the Codes table.

Contact Activity Import

This import allows you to enter contact activity information. No tickler information will be imported as part of this import. This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Cust_Personnel
- Customer
- Customer_Csm
- Contact_History
- Personnel
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Act_Contact_Name

If filled in, must contain a value contact name in the format Last_Name, First_Name. This must uniquely identify an existing contact.

Activity_Outcome

If filled in, must contain a valid value for Outcome_Id from the Codes table.

Activity_Purpose

If filled in, must contain a valid value for Purpose_Id from the Codes table.

Activity_Type

Must contain a valid value for Sls_Activity_Id from the Codes table. This field is required.

Cust_Person_Id

If filled in, must contain a valid Cust_Person_Id from the Cust_Personnel table.

Customer_Id

If filled in, must contain a valid Customer_Id from the Customer table. If the Cust_Person_Id field is filled in, this field is ignored.

Customer_Name

If filled in, must contain a valid Name from the Customer table. If the Cust_Person_Id or Customer_Id fields are filled in, this field is ignored.

Event_Date

If this field is not filled in, the current date will be used.

Event_Time

If this field is not filled in, the current time will be used.

Excl_Campaigns

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Excl_Email

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Excl_Phases

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Excl_Phone

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Excl_Pmail

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

First_Name

The combination of the First_Name and Last_Name fields must be unique. If Cust_Person_Id is filled in, this field is ignored.

Last_Name

The combination of the First_Name and Last_Name fields must be unique. If Cust_Person_Id is filled in, this field is ignored.

Left_Message

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Misc_Dropdown1-2

If filled in, must contain a valid value from the Codes table for ContActv_Misc1-2_Id.

Misc_Flag1-2

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Person_Name

If filled in, must contain a value contact name in the format Last_Name, First_Name. This must uniquely identify an existing contact. If Cust_Person_Id is filled in, this field is ignored.

Source_Customer_Id

If filled in, must contain a valid Source_Customer_Id from the Customer_Csm table.

Tick_Priority

If filled in, must contain a valid value for Tick_Priority_Id from the Codes table.

Contact Type Import

This import allows you to add contact types associated with a specific contact person for an account. This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Customer
- Customer_CSM
- Cust_Personnel
- Product_Interest
- Product
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Contact_Id

If filled in, must contain an existing Contact Id. If this field is filled in, the following fields are ignored: First_Name, Last_Name, Customer_Id, Customer_Name, and Source_Cust_Id.

Contact_Name

The name of the contact in the format Last Name, First Name.

Contact_Type

If filled in, must be a valid value for Contact_Type_Id from the Codes table. Both Prod_Int_Name and Contact_Type cannot be blank.

Customer_Id

If filled in, it must be a valid existing Customer Id. This field is ignored if Contact_Id is filled in.

Customer_Name

If filled in, it must be a valid existing Customer. This must uniquely identify the customer. This field is ignored if Contact_Id is filled in.

First_Name

The contact's first name. The contact must exist in the database. If Contact_Id is filled in, this field is ignored.

Last_Name

The contact's last name. The contact must exist in the database. If Contact_Id is filled in, this field is ignored.

Prod_Int_Name

If filled in, must be a valid product name in the Product table. Both Prod_Int_Name and Contact_Type cannot be blank.

Source_Cust_Id

If Customer_Id is filled in, this field is ignored. Otherwise, it will be used to find the customer with the same Source_Cust_Id. This field is ignored if Contact_Id is filled in.

Equipment Import

This import allows you to enter equipment information. This import can be run in two different ways:

- **New Import** (This is the default)
Import records will be processed as new records.
- **New/Re-import** (Perform re-import option)
Import records will be processed as new records or as updates to existing records.

Tables Used in this Import

- Customer
- Cust_Personnel
- Equipment
- Vendor
- Product
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Contact_Id

If filled in, must be a valid Contact_Id that already exists in the database. This must be blank if the equipment being imported has a status of 'Inventory'.

Contact_Name

If Contact_Id is filled in, this field will be ignored. If this is filled in, must contain a valid full name from the Cust_Personnel table for the customer identified. The format of this field is Last_Name, First_Name. This must be blank if the equipment being imported has a status of 'Inventory'.

Customer_Id

If filled in, must be a valid Customer Id that already exists in the database. This must be blank if the equipment being imported has a status of 'Inventory'.

Customer_Name

If Customer_Id is filled in, this field will be ignored. If this is filled in, it must contain a valid customer name which uniquely identifies a customer in the database. This must be blank if the equipment being imported has a status of 'Inventory'.

Equip_Status

For new records this field must be filled in and contain a valid value for Equip_Status_Id in the Codes table. The following values shipped with the system are the only valid ones that can be used with the import program.

'Installed'	This status indicates the equipment item is installed at the customer site. If this status is used, Customer_Name or Customer_Id must be filled in and valid. Model_Name must exist and be valid as well.
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'Inventory' This indicates an item in inventory for customer use. If this status is used, Equipment_Owner, Customer_Id, Customer_Name, Contact_Id, and Contact_Name must be blank.

Equipment_Owner

If filled in, must contain a valid value for Equipment_Owner_Id in the Codes table. This must be blank if the equipment being imported has a status of 'Inventory'.

Equipment_Type

For new records this field must be filled in and contain a valid value for Equipment_Type_Id in the Codes table.

Inventory_Tag_No

If filled in, must be a unique alpha-numeric value.

Manufacturer

If filled in, must be a valid vendor name in the Vendor table.

Misc_Dropdown1-8

If filled in, must be a valid value for Equipment_Misc1-8_Id from the Codes table.

Model_Name

For new records this field is required. Must contain a valid model name in the Product table.

Repair_Vendor

If filled in, must be a valid vendor name in the Vendor table.

Selling_Vendor

If filled in, must be a valid vendor name in the Vendor table.

Incident & Problem Import

This import allows you to create an incident and problem record at the same time for a customer issue or an internal request. This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Incident
- Problem
- Customer
- Cust_Personnel
- Equipment
- Personnel
- Product
- Codes

Import Processing

Because the Incident & Problem import performs the same processing for incidents as the Incident panel, certain system defaults may affect the behavior of the import.

- When closing an incident, you have the option of requiring a characteristic value for the incident before closing. If this option is ON, the import will reject any records which have a close date and no matching characteristic values in the *Long Description*. This option is on the Inc/Prob tab of the User Group Preference panel.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Assignee_First_Name

If filled in, it must contain a valid First Name from the Personnel table. If Problem.Assignee_Name is filled in, this field is ignored.

Assignee_Last_Name

If filled in, it must contain a valid Last Name from the Personnel table. If Problem.Assignee_Name is filled in, this field is ignored.

Incident.Close_Description

This field is required if Incident.Date_Closed is filled in.

Incident.Closed_Immed

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Incident.Close_Reason

If filled in, must contain a valid value for Close_Reason_Id from the Codes table. This is required if the incident status has an internal value of 'CLOS' or 'UCLOS'.

Incident.Contact_Id

If filled in, must contain a valid Contact_Id. This field is required if the option in User Group Preferences is not set to require a contact. If this field is filled in, Contact_Name is ignored.

Incident.Contact_Name

If filled in, it must contain a valid contact name from the Cust_Personnel table in "Last Name, First Name" format. If this field is not filled in, the default contact for this customer is used. If there is no default contact, this field is required if the option in User Group Preferences is not set to require a contact. If Contact_Id is filled in, this field is ignored.

Incident.Cust_Needs_Est

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Incident.Customer_Id

If filled in, must contain a valid Customer_Id in the database. If this field is filled in, Customer_Name is ignored. Either Customer_Id or Customer_Name is required if Contact_Id or Contact_Name is not specified.

Incident.Customer_Name

If filled in, must contain a valid Customer_Name from the database. If Customer_Id is filled in, this field is ignored. Either Customer_Id or Customer_Name is required if Contact_Id or Contact_Name is not specified.

Incident.Date_Closed

If Date_Closed is filled in and the Date_Opened is not filled in or is later than the Date_Closed, then the Date_Opened will be changed to be the same as the Date_Closed. This field must be filled in if the Incident_Status is a 'Closed' status.

Incident.Date_Opened

If this field is not filled in, today's date will be used.

Incident.Department_Name

If filled in, it must contain a valid Department_Id or Department_Name from the Department table. If an Owner is specified, this field is ignored. If both Department and Owner are not specified the department of the person logged into RTIIMP.exe will be used. This field identifies the department that owns the incident if Owner is not filled in and identifies the department that owns the problem if Incident.Owner_Name and Problem.Assignee_Name are not filled in.

Incident.Inc_Origin_Name

If filled in, it must be a valid value for Inc_Origin_Id from the Codes table.

Incident.Incident_Id

If filled in, it must contain a unique numeric value that will be used as the incident and problem Id. If the Id already exists in the database, the import record will be rejected. If not filled in, the system will assign the next unique Incident_Id.

When running this import using this field, no one should be creating incidents. After each Incident/Problem is imported, the system updates the next incident Id counter on the database with the highest incident Id. If a user creates an incident while the import is creating incidents, it is

possible for an import record to be rejected because an incident was created through Incident Handling which uses the Id.

Incident.Incident_Status

If filled in, must contain a valid value of an Incident_Status_Id from the Codes table. If this is not filled in, the default status ('Initial' if the person logged on is an Operator, otherwise, 'Active') will be used. If the status provided is a closed status, Close_Description must be filled in. If the status selected is not an active status, the incident will be created with an active status, and then updated to the status specified in the import.

If Incident.Date_Closed is filled in, the Incident_Status must be a "closed" status.

Incident.Long_Desc

If the long description is greater than 32000 characters, the first 32000 characters will be stored in the Long Description of the Incident. An incident history record will be created with an attachment which will contain the entire long description. The same Long Description will be in the both the Incident and Problem record but only the Incident will contain a history record with an attachment for descriptions longer than 32000 characters.

Incident.Misc_Customer_Name

If filled in, must contain the name of a valid customer and uniquely identify the customer.

Incident.Misc_Dropdown1-20

If filled in, must be a valid value for Incident_Misc1-20_Id from the Codes table.

Incident.Notify_Owner

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Owner_First_Name

If filled in, it must contain a valid First Name from the Personnel table. If the Incident.Owner_Name field is filled in, this field is ignored.

Owner_Last_Name

If filled in, it must contain a valid Last Name from the Personnel table. If the Incident.Owner_Name field is filled in, this field is ignored.

Incident.Owner_Name

If filled in, it must contain a valid Person_Id or the owner's name in "Last Name, First Name" format from the Personnel table. This field identifies the incident Owner and the problem Assignee if Problem.Assignee_Name is not filled in.

Incident.Primary_Program

If filled in, this is the primary program associated with the incident and it must contain a valid program defined in the Program table.

Incident.Priority

If filled in, must contain a valid value of a Priority_Id from the Codes table.

Incident.Product_Refresh

This field is required and must contain a valid refresh from the Product_Refresh table. If only a product name is specified, the latest refresh for that product is used.

Incident.Project

If filled in, it must be a valid value for Project_Id from the Codes table.

Incident.Public_Incident

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Incident.Severity

If filled in, must contain a valid value of a Severity_Id from the Codes table. This is required if the Problem_Type is 'Software Defect' or 'Documentation Error'.

Incident.Source

If filled in, it must be a valid value for Source_Id from the Codes table.

Incident.Source_Incident_Id

If performing a reimport, this field, if filled in, must contain a valid Source Incident Id. If this field is filled in for a reimport, the Incident.Incident_Id field is ignored.

Incident.Time_Closed

If not filled in and the Incident_Status is 'Closed', the current time will be used.

Incident.Time_Opened

If not filled in, the current time will be used.

Problem.Assignee_Name

If filled in, it must contain a valid person defined in the Personnel table. Its format is "Last_Name, First_Name". If not filled in, the Owner_Name field will be used.

Problem.Bulletin_Board

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Problem.Close_Reason

If filled in, must contain a valid value for Close_Reason_Id from the Codes table.

Problem.Date_Closed

If Date_Closed is filled in and the Date_Opened is not filled in or is later than the Date_Closed, then the Date_Opened will be changed to be the same as the Date_Closed. This field must be filled in if the Problem_Status is a 'Closed' status.

Problem.Date_Opened

If this field is not filled in, today's date will be used.

Problem.Department

If filled in, it must contain a valid Department_Id or Department_Name from the Department table. If an Assignee is specified, this field is ignored. If both Department and Assignee are not specified the department of the person logged into RTIIMP.exe will be used. This field identifies the department that owns the problem if Assignee_Name is not filled in and identifies the department that owns the problem if Incident.Owner_Name and Problem.Assignee_Name are not filled in.

Problem.Internal_Priority

If filled in, must contain a valid value of a Priority_Id from the Codes table.

Problem.Introduced_In

If filled in, must contain a valid value for Introduced_In_Id from the Codes table.

Problem.Long_Desc

If the long description is greater than 32000 characters, the first 32000 characters will be stored in the Long Description of the Problem. A problem history record will be created with an attachment which will contain the entire long description. The same Long Description will be in the both the Incident and Problem record but only the Incident will contain a history record with an attachment for descriptions longer than 32000 characters.

Problem.Misc_Dropdown1-8

If filled in, must be a valid value for Incident_Misc1-8_Id from the Codes table.

Problem.Notify_Assignee

If this field is 'Y', the Notify Assignee flag will be set to ON for this problem.

Problem.Perm_Fix_Required

If filled in, valid values are 'Y', 'y', 'N', or 'n'. If 'Y' or 'y' is entered, a permanent fix record will be created for the problem.

Problem.Primary_Program

If filled in, this is the primary program associated with the problem and it must contain a valid program defined in the Program table.

Problem.Problem_Id

If filled in, must contain a unique identifier of an existing problem.

Problem.Problem_Status

If filled in, must contain a valid value of a Problem_Status_Id from the Codes table. If this is not filled in, the default status 'Active' will be used. If the status provided is a closed status, Close_Description must be filled in.

If Problem.Date_Closed is filled in the Problem_Status must be a "closed" status.

Problem.Problem_Type

If filled in, it must contain a valid value for Problem_Type_Id from the Codes table. If this is not filled in, the default problem type will be used from the Set-Up Defaults panel.

Problem.Product_Name

If filled in, must contain a valid product name from the Product table.

Problem.Product_Refresh

If this field is filled in, must contain a valid refresh from the Product_Refresh table. If only a product name is specified, the latest refresh for that product is used.

Problem.Project

If filled in, it must be a valid value for Project_Id from the Codes table.

Problem.Resolution_Desc

If the resolution description is greater than 32000 characters, the first 32000 characters will be stored in the Resolution Description of the Problem. A problem history record will be created with an attachment which will contain the entire resolution description. The same Resolution Description will be in the both the Incident and Problem record but only the Incident will contain a history record with an attachment for descriptions longer than 32000 characters.

Problem.Severity

If filled in, must contain a valid value of a Severity_Id from the Codes table. If left blank, the value will default from the Severity field for the incident.

Problem.Submitter

If filled in, must contain a valid user name from the Personnel table. Must be in the format Last Name, First Name. If this field is not filled in, will contain value in the Owner_Name.

Problem.Submitter_Dept

If filled in, must contain the name of an active department from the Department table. If the Problem.Submitter field is filled in, this field is ignored.

Problem.Temp_Fix_Required

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Problem.Time_Closed

If not filled in and the Problem_Status is 'Closed', the current time will be used.

Problem.Time_Opened

If not filled in, the current time will be used.

Incident History Import

This import allows you to enter history information for incidents. Attachments can be imported through this import. This import is run in the following way:

- **New Import**
Import records will be processed as new records.

Tables Used in this Import

- Incident
- Inc_History
- Customer
- Customer_Csm
- Department
- Personnel
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Action_Taker_Last_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Action_Taker_First_Name field is filled in, this field is required. If this field is blank, the name of the person logged into the import utility will be used.

Action_Taker_First_Name

If filled in, must contain a valid first name of a user from a department in the database. If the Action_Taker_Last_Name field is filled in, this field is required. If this field is blank, the name of the person logged into the import utility will be used.

Action_Taker

If filled in, must contain the first and last name of a user from a department in the database. This must be in the format LastName, FirstName. If this field is blank, the name of the person logged into the import utility will be used.

Phone_Contact_Last_Name

If filled in, must contain a valid last name of a contact at the customer site for which the incident is associated.

Phone_Contact_First_Name

If filled in, must contain a valid first name of a contact at the customer site for which the incident is associated.

Phone_Contact

If filled in, must contain the first and last name of the contact person at the customer site for which the incident is associated. This must be in the format LastName, FirstName.

Owner_Last_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Owner_First_Name field is filled in, this field is required. If this field is blank, the current incident Owner is used.

Owner_First_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Owner_Last_Name field is filled in, this field is required. If this field is blank, the current incident Owner is used.

Owner_Name

If filled in, must contain the first and last name of the person that owned the incident at the time of the event. This must be in the format LastName, FirstName. If this field is blank, the current incident Owner is used.

Source_Incident_Id

This field is required. Must uniquely identify an existing incident.

Customer_Id

If filled in, must uniquely identify an existing customer in the database. If Phone_Contact_Last_Name, Phone_Contact_First_Name, or Phone_Contact is filled in, this field is used to identify an account if the existing incident Customer_Id does not apply.

Billing_Code

If filled in, it must contain a valid value for Billing_Code_Id from the Codes table.

Department_Name

If filled in, it must contain the name of an active department in the database. This is the department to which the incident Owner belongs.

Event_Date

If this field is blank, the current date is used.

Event_Time

If this field is blank, the current time is used.

Event_Type

This field is required. Must contain a valid value for Inc_Activity_Id from the Codes table.

Incident_Status

If filled in, it must contain a valid value for Incident_Status_Id from the Codes table. If this field is blank, the current incident Status is used.

IHist_Misc_Drop1-2

If filled in, it must contain a valid value for Inc_Hist_Misc1-2_Id from the Codes table.

Person_BillDpt

If filled in, it must contain the name of an active department in the database to which the Person_Billing belongs.

Person_Billing

If filled in, must contain the first and last name of the person that associated with the time entered for the incident.

License Import

This import allows you to enter license information for customers. This import can be run in two different ways:

- New Import (This is the default)
Import records will be processed as new records.
- New/Re-import (Perform re-import option)
Import records may be processed as new records or as updates to existing records.

Tables Used in this Import

- License
- License_Item
- Customer
- Cust_Personnel
- Customer_CPU
- Product
- Codes

Options

- Before the import data is processed, the user is prompted with the question: "If the Refresh_Name is not specified, do you want the latest refresh to be shipped to the customer?" If the user answers yes, the program will automatically ship the latest refresh in the Product_Refresh table to the account for each record in the import data where Refresh_Name is left blank. Otherwise, no refresh will be shipped to the account.
- When doing a re-import, there is an *Increment Number of Users when importing license* option available on the Other Import Options screen in the Import Wizard. If this field checked, if import file includes the License.License_Number or License.Source_License_Id, and License_Item.Product_Name, License_Item.Cust_Name, and License_Item.Number_Of_Users fields, the number of users will be increased by the number identified in the import file.

Import Processing

Using the New Import Facility

- If the License_Id is in the import file, and a license with this License_Id does not already exist, a new record is added. If the License_Id is in the import file, and an account with this License_Id already exists, the import record is rejected.
- If the License_Id is not in the import file, but the Source_License_Id is filled in, and a license with this Source_License_Id does not already exist, a new record is added. If the License_Id is not in the import file, but the Source_License_Id is filled in, and a license with this Source_License_Id already exists, the import record is rejected.

- If neither the License_Id nor Source_License_Id is provided, a new record is added.

Using the New/Re-Import Facility

- If the License_Id is in the import file and a license with this number already exists, that license will be used.
- If the License_Id is in the import file and a license with this number does not already exist, a new record is added.
- If the License_Id is not in the import file, but the Source_License_Id is filled in, if a single license with this Source_License_Id already exists, that license will be used. If multiple matches are found in the database, the record is rejected.
- If the License_Id is not in the import file, but the Source_License_Id is filled in, if a license with this Source_License_Id does not already exist, a new record is added.
- If neither the License_Id nor Source_License_Id is provided, the following is used to find an existing license:
 - Customer Id or Customer Name
 - License Type
 - CPU Id
 - Product Name
 - Implementation Name

If a match is found, that license will be used. If multiple matches are found in the database, the record is rejected.

If no match is found, then the following is used:

- Customer Id or Customer Name
- License Type
- License Category

If a match is found, that license will be used. If multiple matches are found in the database, the record is rejected.

If no match is found, a new license is added:

- If neither the License_Id, nor Source_License_Id, nor Customer_Id or Customer Name is provided, the record is rejected.
- The following is used to find an existing license item record for the specific license:
 - CPU Id
 - Product Name
 - Implementation Name

If a match is found, that license item will be used. If multiple matches are found in the database, the record is rejected.

If no match is found, a new license item is added:

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

CPU_Manufacturer

If filled in, must contain a valid manufacturer from the Vendor table.

CPU_Model

If filled in, must contain a valid model name in the Product table.

CustProduct.Serial_Number

The serial number for a product that will be added to the customer's list of Shipped Products.

License.Distrib_Media

If filled in, must contain a valid value for Distrib_Media_Id from the Codes table.

License.Escrow_Type

If filled in, must contain a valid value for Escrow_Type_Id from the Codes table.

License.License_Exp_Date

Leaving this field blank indicates a perpetual License.

License.License_Number

If filled in and no license with this number exists, a new license will be created. If a license with this number exists in the license table, the program compares the import data with the existing license data.

If a license already exists for this customer where all of the license attributes are the same as this import record, then an item will be added to that license rather than creating a new license. A license_item record will be added to associate this account with the license if one does not already exist. If a CPU_Serial_Number is specified, a license item record will also be added to associate this CPU with the license, if one does not already exist. A new license_item record will be added for this account, product, implementation, and CPU combination if it does not exist.

License.License_Type

If specified this must be a valid value for License_Type_Id from the Codes table. If not specified, the License_Type_Id with an internal value of 'STD' will be used.

License.Lic_Category

If specified this must be a valid value for Lic_Category_Id from the Codes table.

License.License_Misc_Dropdown1-8

If specified this must be a valid value for License_Misc1-8_Id from the Codes table.

License.Primary_Contact

If filled in, must contain a valid Contact_Name from the database for the Customer_Id or Cust_Name. If the Primary_Contact_Id is filled in, this field is ignored.

License.Primary_Contact_Id

If filled in, must contain a valid Contact_Id from the database for the Customer_Id or Cust_Name. If this field is filled in, the Primary_Contact field is ignored. If both the License_Item.Customer_Id and License_Item.Customer_Name are not filled in, this must be filled in to uniquely identify the account.

License.Source_License_Id

If filled in, must contain a valid source license Id.

License_Item.CPU_Id

If filled in, must contain a valid CPU_Id defined for the Customer_Id or Cust_Name indicated.

License_Item.CPU_Number

If filled in, must contain a valid CPU_Number defined for the Customer_Id or Cust_Name indicated. If a CPU with this number does not exist for the customer, one will be created using the CPU_Manufacturer, CPU_Model, CPU_Group_Code specified. If a record already exists for the customer and CPU_Number, a warning is printed to the log file.

License_Item.Cust_Name

If Customer_Id is filled in, this field is ignored. If used, it must uniquely identify only one account in the database.

License_Item.Customer_Id

If filled in, must be a valid existing Customer_Id in the database. If this field is left blank, Cust_Name must be filled in.

License_Item.Impl_Name

This must contain a valid implementation name for the product if implementations have been defined for the Product in the Product_Impl table. For products where no implementation name has been specified, it is valid to leave this field blank.

License_Item.Number_Of_Users

If filled in, contains an integer. When performing a reimport and the *Increment Number of Users when importing license* field is checked, the number of the users is increased by the number in this field.

License_Item.Misc_Dropdown1-6

If filled in, must contain a valid value for Lic_Item_Misc1-6_Id from the Codes table.

License_Item.Product_Name

Must contain a valid product name defined in the Product table.

License_Item.Type_Of_User

If filled in, must contain a valid value for Type_Of_User_Id from the Codes table.

Refresh_Name

If filled in, must contain a valid "Refresh_Type" and "Refresh_Level" from the Product_Refresh table (for example, G01). If Product_Name and Version_Name are filled in, this field can be used to indicate that a specific refresh of a product was sent to the account.

If Refresh_Name is left blank and the user has chosen to ship the latest refresh to the account, the latest refresh will be determined from the Product_Name, Impl_Name, and Version_Name. A Cust_Has_Product record will be created for the customer specified for this refresh if one does not already exist. The Number_Of_Copies is assumed to be one.

Version_Name

If filled in, must contain a valid version name for this product from the Product_Version table. If Refresh_Name is filled in, this field must be filled in.

Maintenance Contract Import

The Maintenance Contract import allows the user to perform one or more of the following actions:

- Add a new contract.
- Add new renewals to existing contracts.
- Add products and accounts to existing contracts.

This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Maint_Contract
- Maint_Type
- Item_On_Maint
- License_Item
- Maint_Renewal
- Codes

Import Processing

- If the Contract_Id and Source_Contr_Id are left blank, a new contract will be added.
- If the Contract_Id or Source_Contr_Id is entered, and no match is found in the database, a new contract will be added.
- If the Contract_Id or Source_Contr_Id is entered, and a match is found in the database, the new information provided will be added for that specific contract.
- A new renewal can be added for an existing contract by providing the Contract_Id or Source_Contr_Id that already identifies the contract in the database, and the renewal information. Existing renewal information in the database cannot be updated.
- Multiple products, equipment, or accounts can be entered for the same contract by using a separate row for each item in the import file. The same Contract_Id or Source_Contr_Id should be entered for each row with the specific product, equipment, or account information.
- As described above, your use of the Contract_Id or Source_Contr_Id will identify if the record is a new contract or an existing contract. Product_Name will identify if it is a new or existing product on the contract, and Serial_Number will identify if it is a new or existing piece of equipment on the contract.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

EQ_Price

If filled in, and if Serial_Number is specified and Inventory Management option is available, it must be a valid float.

Equipment.Equipment_Type

If filled in, it must be a valid value for Equipment_Type_Id from the Codes table.

Equipment.Serial_Number

If filled in, it must be a valid serial number which can define the Equipment_Id uniquely. If Inventory Management option is not available, it is ignored.

License_Item.Copies_To_Ship

If Product_Name is not filled in, this field is ignored, else if it is filled in, it must be a valid float.

License_Item.CPU_Id

If filled in, must contain a valid CPU_Id for the Customer from the Cust_CPU table.

License_Item.CPU_Number

If filled in, must contain a valid CPU_Number for the Customer from the Cust_CPU table.

License_Item.Cust_Name

If Customer_Id is filled, it is ignored, else it must be filled in and it must uniquely identify only one customer in the database.

License_Item.Customer_Id

If it is filled in, it must be a valid Customer Id in the database. If this field is filled in, Cust_Name is ignored.

License_Item.Impl_Name

If Product_Name is not filled in, this field is ignored, else if it is filled in, it must be a valid implementation name for the product from the Product_Impl table.

License_Item.Misc_Dropdown1-6

If filled in, must contain a valid value for License_Item_Misc1-6_Id from the Codes table.

License_Item.Product_Name

If filled, it must be a valid product name from the Product table.

License_Item.Type_Of_User

If filled in, must contain a valid value for Type_Of_User_Id from the Codes table.

Maint_Contract.All_Products

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Maint_Contract.Contract_Id

If it is filled in and it is a valid existing contract id in the database, the existing records will be updated, otherwise new records will be created.

Maint_Contract.Default_Contract

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Maint_Contract.Low_Units_Warn

If class of the maintenance type is not pre-paid, it is ignored, else if it is filled, it must be a valid float.

Maint_Contract.Maint_Declined

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Maint_Contract.Maint_Term

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Maint_Contract.Maint_Type

It must be filled in and must be a valid Maintenance Type defined in the Maint_Type table.

Maint_Contract.Misc_Dropdown1-2

If filled in, must contain a valid value for Maint_Misc1-2_Id from the Codes table.

Maint_Contract.Primary_Contact

If filled in, must contain a valid contact name from the Cust_Personnel table in the format Last Name, First Name. If both this field and the Primary_Contact_Id field are filled in, this field is ignored.

Maint_Contract.Primary_Contact_Id

If filled in, must contain a valid Cust_Person_Id from the Cust_Personnel table for a contact associated with the Customer. If this field is filled in, the Primary_Contact field is ignored.

Maint_Contract.Shared_Contract

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Maint_Contract.Source_Contr_Id

If it is filled in, it must be unique. If Contract_Id is filled in this field is ignored. If Contract_Id is not filled in and Source_Contr_Id already exists in the database, existing records will be updated, else new records will be created. If Contract_Id and Source_Contr_Id are not filled in, new records will be created.

Maint_Contract.Units_Type

If filled in, must contain a valid value for Common_Code_Id from the Codes table.

Maint_Renewal.Action_Taker

If filled in, must contain a valid user from the Personnel table in the format, Last Name, First Name.

Maint_Renewal.Misc_Dropdown1-2

If filled in, must contain a valid value for MC_Renewal_Misc1-2_Id from the Codes table.

Maint_Renewal.Renew_End_Date

Must be later than Renew_Start_Date.

Maint_Renewal.Renew_Start_Date

This is required if creating a new contract.

Maint_Renewal.Renew_Status

If filled in, must contain a valid value for MC_Renew_Stat_Id from the Codes table.

Maint_Renewal.Units_Avail

If class of the maintenance type is not pre-paid, it is ignored, else if it is filled, it must be a valid float.

Maint_Renewal.Units_Id

If filled in, must contain a valid value for Common_Code_Id from the Codes table.

Maint_Renewal.Units_Purchased

If class of the maintenance type is not pre-paid, it is ignored, else if it is filled, it must be a valid float.

Personnel Import

This import allows you to enter information about your personnel. This import can be run in two different ways:

- New Import (This is the default)
Import records will be processed as new records.
- Re-import (Perform re-import option)
Import records will be processed as updates to existing records.

Tables Used in this Import

- Personnel
- Department
- Cust_Personnel
- User_Profile
- Codes

Import Processing

Using the New-Import Facility

- If First_Name and Last_Name are already in the database, a warning message will be provided, but the record will still be imported.
- If Person_Id is provided and it already exists in the database, the record will be rejected.

Using the Re-Import Facility

- The Person_Id is required when re-importing data for an existing person in the database. If the Person_Id is not found, the record will be rejected.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Dept_Name

This field is required when doing a new import of personnel. It must contain a valid name of a department.

E-Mail_Address

If you are using an SMTP mail system, this must be filled in for each user if you are going to send e-mail via *CustomerFirst*.

Employee_Status

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

First_Name

This field is required when doing a new import of personnel.

Group_Pref

If filled in, must contain a valid value for User_Group_Id from the Codes table.

Last_Name

This field is required when doing a new import of personnel.

Password

This field is required only if the user you are importing has a User_Id and they will be logging into *CustomerFirst*.

Person_Id

For a new import, if this field is filled in, it must be unique. This field is required when performing a re-import.

User_Id

This field is required only if the user you are importing will be logging into *CustomerFirst*. This field must be unique.

User_Profile_User_Class_Name

This field is required when importing a new user. Must contain a valid value for User_Cls_Name_Id from the Codes table.

Problem Only Import

This import allows you to import problem records without creating an associated incident. This import is run in the following way:

- **New Import**
Import records will be processed as new records.

Tables Used in this Import

- Problem
- Personnel
- Department
- Product
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Assignee_First_Name

If filled in, it must contain a valid First Name from the Personnel table. If Assignee_Name is filled in, this field is ignored.

Assignee_Last_Name

If filled in, it must contain a valid Last Name from the Personnel table. If Assignee_Name is filled in, this field is ignored.

Assignee_Name

This field is required if the Department field is blank. Must be the name of a valid existing user in the database in the format Last_Name, First_Name.

Bulletin_Board

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Close_Reason

This field is required if the Problem_Status is 'Closed' (Internal Value 'CLOS' or 'UCLOS'). Must be a valid value for Close_Reason_Id.

Date_Closed

This field is required if the Problem_Status is 'Closed'. Date_Closed cannot be later than Date_Opened. If it is, it will be set to the Date_Opened automatically.

Department

This field is required if the Assignee_Name field is blank. Must be the name of an active Department in the database.

Internal_Priority

If filled in, must be a valid value for Priority_Id from the Codes table.

Introduced_In

If filled in, must be a valid value for Introduced_In_Id from the Codes table.

Long_Desc

If the long description is greater than 32000 characters, the first 32000 characters will be stored in the Long Description of the Problem. A problem history record will be created with an attachment which will contain the entire long description.

Misc_Dropdown1-8

If filled in, must be a valid value for Problem_Misc1-8_Id from the Codes table.

Notify_Assignee

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Perm_Fix_Required

If filled in, valid values are 'Y', 'y', 'N', or 'n'. If 'Y' or 'y' is entered, a permanent fix record will be created for the problem.

Primary_Program

If filled in, must be a valid primary program name for the Product_Name selected.

Problem_Id

If Source_Problem_Id is filled in, this field is ignored.

Problem_Status

If filled in, must be a valid value for Problem_Status_Id from the Codes table. If this field is blank, the problem status defaults to 'Active'. If the status selected is not an active status, the problem will be created with an active status, and then updated to the status specified in the import.

Problem_Type

This field is required. Must be a valid value for Problem_Type_Id from the Codes table.

Product_Name

If filled in, must be an existing, active product name from the database. This field must be filled in if Product_Refresh is blank.

Product_Refresh

If filled in, must contain a valid refresh name for the Product_Name identified. This field must be filled in if Product_Name is blank.

Project

If filled in, must be a valid value for Project_Id from the Codes table.

Resolution_Desc

If the resolution description is greater than 32000 characters, the first 32000 characters will be stored in the Resolution Description of the Problem. A problem history record will be created with an attachment which will contain the entire resolution description.

Severity

If filled in, must be a valid value for Severity_Id from the Codes table. If the Problem_Type has an Internal Value of 'SFTWR' or 'DCERR', and this field is blank, the lowest severity will be used.

Source_Problem_Id

If filled in, must contain an existing Source Problem Id. If this field is filled in, Problem_Id is ignored.

Submitter

If filled in, must contain the name of a valid existing user in the database in the format Last_Name, First_Name.

Submitter_Dept

If filled in, must contain a valid department name from the Department table. This field is ignored if the Submitter field is filled in.

Temp_Fix_Required

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Time_Closed

This field is required if the Problem_Status is 'Closed'. If this field is not filled in and the Problem_Status is 'Closed', the current time is used.

Time_Opened

If not filled in, the current time will be used.

Problem History Import

This import allows you to enter history information for problems. Attachments can be imported through this import. This import is run in the following way:

- **New Import**
Import records will be processed as new records.

Tables Used in this Import

- Problem
- Problem_History
- Department
- Personnel
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Action_Taker_Last_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Action_Taker_First_Name field is filled in, this field is required. If this field is blank, the name of the person logged into the import utility will be used.

Action_Taker_First_Name

If filled in, must contain a valid first name of a user from a department in the database. If the Action_Taker_Last_Name field is filled in, this field is required. If this field is blank, the name of the person logged into the import utility will be used.

Action_Taker

If filled in, must contain the first and last name of a user from a department in the database. This must be in the format LastName, FirstName. If this field is blank, the name of the person logged into the import utility will be used.

Assignee_Last_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Assignee_First_Name field is filled in, this field is required. If this field is blank, the current problem Assignee is used.

Assignee_First_Name

If filled in, must contain a valid last name of a user from a department in the database. If the Assignee_Last_Name field is filled in, this field is required. If this field is blank, the current problem Assignee is used.

Assignee_Name

If filled in, must contain the first and last name of the person that was assigned the problem at the time of the event. This must be in the format LastName, FirstName. If this field is blank, the current problem Assignee is used.

Source_Problem_Id

If filled in, must uniquely identify an existing problem. If filled in, the Problem_Id field is ignored.

Billing_Code

If filled in, it must contain a valid value for Billing_Code_Id from the Codes table.

Department_Name

If filled in, it must contain the name of an active department in the database. This is the department to which the problem Assignee belongs.

Event_Date

If this field is blank, the current date is used.

Event_Time

If this field is blank, the current time is used.

Event_Type

This field is required. Must contain a valid value for Prb_Activity_Id from the Codes table.

Problem_Id

The unique identifier to which the problem history is associated. If the Source_Problem_Id is filled in, this field is ignored.

Problem_Status

If filled in, it must contain a valid value for Problem_Status_Id from the Codes table. If this field is blank, the current problem Status is used.

Person_BillDpt

If filled in, it must contain the name of an active department in the database to which the Person_Billing belongs.

Person_Billing

If filled in, must contain the first and last name of the person that associated with the time entered for the problem.

Product Import

The Product Import can create Product, Product Version, Product Implementation, and Product Refresh records within the database. This import can be run in two different ways:

- **New Import** (This is the default)
Import records will be processed as new records.
- **Re-import** (Perform re-import option)
Import records will be processed as updates to existing records.

Tables Used in this Import

- Product
- Product_Version
- Product_Impl
- Product_Refresh
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Active_Flag

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Build_Date

This field must be filled in if Refresh_Name is filled in. In addition, refresh dates for different refreshes for the same product, version, and implementation must be unique.

Impl_Name

If this Impl_Name does not exist, one will be created. For products where no implementation name has been specified, it is valid to leave this field blank. In Oracle, Quadbase, and DB2/2 the implementation name is case sensitive.

Language

If filled in, must contain a valid value for National_Lang_Id from the Codes table.

Monitor

If filled in, must be a valid value for TP_Monitor_Id from the Codes table.

Name

This field is required. If this Name does not exist, a product record will be created.

Operating_System

If filled in, must be a valid value for Oper_Sys_Id from the Codes table.

Product_Family

If filled in, must be a valid value for Product_Family_Id from the Codes table.

Refresh_Name

The Refresh_Name is a combination of the Refresh_Type and the Refresh_Level. If filled in and this refresh type and refresh level does not exist a product refresh record will be created. If any refreshes have already been defined for this version and implementation then this field must be filled in. Otherwise, this field may be left blank. In Oracle, Quadbase, and DB2/2, the refresh name is case sensitive.

Version_Name

If filled in and the version name does not exist, one will be created. If no versions have already been defined for this product it may be left blank. If any versions have already been specified for this product then this field must be filled in. In Oracle, Quadbase, and DB2/2 the version name is case sensitive.

Sales Opportunity Import

This import allows you to enter information related to sales opportunities. This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Sales_Opportunity
- Customer
- Customer_Csm
- Competition
- Department
- Personnel
- Specific_Source
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Budget_Approved

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Close_Date

This field is required if the Sales_Stage has an internal value of 'LOST'.

Contact_FirstName

If filled in, must contain a valid contact first name for the Customer identified. If a contact record for the same First Name and Last Name does not exist, one will be added.

Contact_LastName

If filled in, must contain a valid contact last name for the Customer identified. If a contact record for the same First Name and Last Name does not exist, one will be added.

Customer_Id

If a Customer_Id is filled in and a customer with that Id already exists, the Source_Cust_Id and Customer_Name will be ignored. If a customer does not exist, Customer_Name is also required, and a new customer record and associated records will be created.

Customer_Name

If Customer_Id or Source_Cust_Id for an existing customer is filled in, this field is ignored. If Customer_Id is filled in for a customer that does not exist, then Customer_Name must be filled in. If neither Customer_Id nor Source_Cust_Id are filled in, then Customer_Name must be filled in. It must uniquely identify an existing customer or a new customer record and associated records will be created.

Date_Opened

If this field is blank, the current date is used.

Department_Name

If filled in, it must be a valid value in Department table. This field is ignored if the Salesperson_Id or Sales_Person fields are filled in.

Lead_Source

If filled in, each level of the lead source hierarchy must be separated by a pipeline (|) character. It is not necessary to include 'All Leads' in the hierarchy.

Lost Reason

If filled in, it must be a valid value for Lost_Reason_Id from the Codes table. This field is required if the Sales_Stage has an internal value of 'LOST'.

Misc_Dropdown1-8

If filled in, must contain a valid value for SIsOp_Misc1-8_Id from the Codes table.

Notify_Salesperson

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Oth_Prod_Purch

If filled in, it must be a valid value for Oth_Product_Name in Competition table (Oth_Product_Name).

Product_Name

If filled in, must be a valid product name in the Product table. A sales product record will be inserted into the Sales_Product table. Only one product can be imported for each sales opportunity.

Sales_Person

If filled in, must contain a valid name from the Personnel table in the format Last Name, First Name. If both this field and the Sales_Person field are filled in, Sales_Person is ignored.

Sales_Stage

If filled in, it must contain a valid value for Sales_Stage_Id in the Codes table. If it is blank, the sales stage with the lowest Sequence_Number will be used as the default value.

Salesperson_Id

If filled in, must contain a valid Person_Id from the Personnel table. Either this field or the Sales_Person field must be filled in. If both this field and the Sales_Person field are filled in, Sales_Person is ignored.

SIs_Priority

If filled in, must contain a valid value for SIs_Priority_Id from the Codes table.

Source_Cust_Id

If Customer_Id is filled in, this field is ignored. Otherwise, if this field is filled in, it must uniquely identify an existing customer.

Source_Sales_Id

If filled in, it cannot already exist in the database. This field should be used if you want to import history records related to a specific sales opportunity. It should be a field from the Source system that is uniquely associated with the appropriate history records.

Tickler_Date

The tickler date and effective date of the work items record corresponding to this import sales opportunity record will be set to this value. If filled in for an opportunity with a Sales_Stage of 'LOST', this field is ignored.

Sales Opportunity History Import

This import allows you to enter history information for sales opportunities. This import is run in the following way:

- New Import
Import records will be processed as new records.

Tables Used in this Import

- Sales_History
- Sales_Opportunity
- Customer
- Customer_Csm
- Competition
- Department
- Personnel
- Codes

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Activity_Type

Must be filled in and be a valid value for SIs_Activity_Id from the Codes table.

Comments

If filled in and its size is bigger than 32000 characters, an attachment will be inserted for this sales history record.

Left_Message

If filled in, valid values are 'Y', 'y', 'N', or 'n'.

Lost_Reason

If filled in, it must be a valid value for Lost_Reason_Id from the Codes table.

Oth_Prod_Purch

If filled in, it must be a valid value for Oth_Product_Name from the Competition table.

Person_Name

Name of the individual who completed this activity. If it is filled in, it must be a valid name in the Personnel table. If filled in, must uniquely identify a person who is defined in the Personnel table. It must be in the format Last_Name, First_Name.

Phone_Contact

If filled in, it must be in the format Last_Name, First_Name. Also, it must be a valid contact name for the Customer defined in the Customer Personnel table. If Phone_Contact_Id is filled in, this field is ignored.

Phone_Contact_Id

If filled in, it must contain a valid Cust_Person_Id from the Cust_Personnel table. If this field is filled in, Phone_Contact is ignored.

Sales_Stage

If filled in, it must be a valid value for Sales_Stage_Id from the Codes table. If not filled in, the sales stage with the lowest sequence number will be used as the default value.

Salesperson

If filled in, it must uniquely identify a sales person who is defined in the Personnel table. It must be in the format Last_Name, First_Name.

Sls_Priority

If filled in, must contain a valid value from the Codes table.

Source_Customer_Id

If Source_Sales_Id is filled in, this field is ignored. Otherwise, it must identify an existing customer having the same Source_Customer_Id in the database. The Source_Customer_Id is initially imported through the Customer import. Since a specific Source_Sales_Id has not been specified, the history record will be associated with the sales opportunity record for this customer that has the most recent date opened.

Source_Sales_Id

If filled in, must identify a sales opportunity uniquely. The Source_Sales_Id is initially imported through the Sales Opportunity import. If it is blank, Source_Customer_Id must be filled in.

Tick_Asgn_Dept

If filled in, must contain a valid value in the Department table. This field is ignored if the Tick_Assignee field is filled in.

Tick_Assignee

If it is filled in, it must be a valid name in the Personnel table. If filled in, must uniquely identify a person who is defined in the Personnel table. It must be in the format Last_Name, First_Name.

Tick_Priority

If it is filled, it must be a valid value for Tick_Priority_Id from the Codes table.

Tickler_Action

If it is filled, it must be a valid value for Tickler_Action_Id from the Codes table.

Tickler_Contact

If filled in, it must contain a contact name for the Customer in the format Last Name, First Name.

Shipment Import

This import allows you to enter shipped product information for a customer. This import is run in the following way:

- New/Re-import
Import records may be processed as new records or as updates to existing records.

Tables Used in this Import

- Cust_Has_Product
- Customer
- Product
- Product_Refresh
- Codes

Import Processing

- The following are used to find an existing shipped product record. There must be an exact match.
 - Customer Id or Customer Name
 - Product Refresh
 - Date Shipped
 - Serial Number

If an existing record cannot be found, a new record is added.

If a specific refresh can be determined, that refresh will be added. If a specific refresh cannot be determined, the Product_Name, Version_Name and Impl_Name will be used to identify the latest refresh. This refresh will then be added.

- If the Product_Name is not provided, the record is rejected.
- If neither the Customer_Id, nor Customer_Name is provided, the record is rejected.
- If a single existing customer cannot be identified, the record is rejected.

Import Fields

There are specific requirements for the following fields. This list **does not** include all of the fields that can be imported using this import. It only includes those fields that have special requirements.

Acquisition_Basis

If filled in, must contain a valid value for Acquisition_Basis from the Codes table.

Contact_Name

If filled in, must contain the name of a valid contact associated with the account in the format LastName, FirstName.

Cust_Prod_Status

If filled in, must contain the value for Cust_Prod_Stat_Id in the Codes table.

Customer_Id

If filled in, must be a valid existing Customer_Id in the database. If this field is blank, Customer_Name must be filled in. Customer_Name is ignored if this field is filled in.

Customer_Name

If Customer_Id is filled in, this field is ignored. If used, it must uniquely identify only one customer in the database. This field must be filled in if Customer_Id is blank.

Date_Shipped

If this is blank, the current date is used.

Default_Refresh

Indicates this product refresh is a default for the account. If filled in, the value must be "Y" or "y".

Impl_Name

If filled in, must contain a valid implementation name for the Product_Name in the Product Refresh table. For product refreshes where no implementation name has been specified, it is valid to leave this field blank.

Misc_Dropdown1-2

If filled in, must contain a valid value for Cust_Has_Prod1-2_Id from the Codes table.

Product_Name

This field is required. Must contain a valid product name that is defined in the Product table.

Product_Refresh

If filled in, must contain a valid full product refresh. This may include some or all of the following: Product Name, Version Name, Implementation Name, Refresh Type, and Refresh Level.

If Product_Refresh is blank, the latest refresh will be determined from the Product_Name, Version_Name, and Impl_Name. A shipped product record will be created for this refresh if one does not already exist for the customer. The Number_Of_Copies is assumed to be one (1).

Version_Name

If filled in, must contain a valid version name for this product in the Product Refresh table.

Import Wizard

The Import Wizard will take you through the screens required to complete the import process. It will include the following:

- Choose the appropriate import
- Select options
- Select the import file
- Define the data layout for the import
- Edit the import data
- Preview the import data

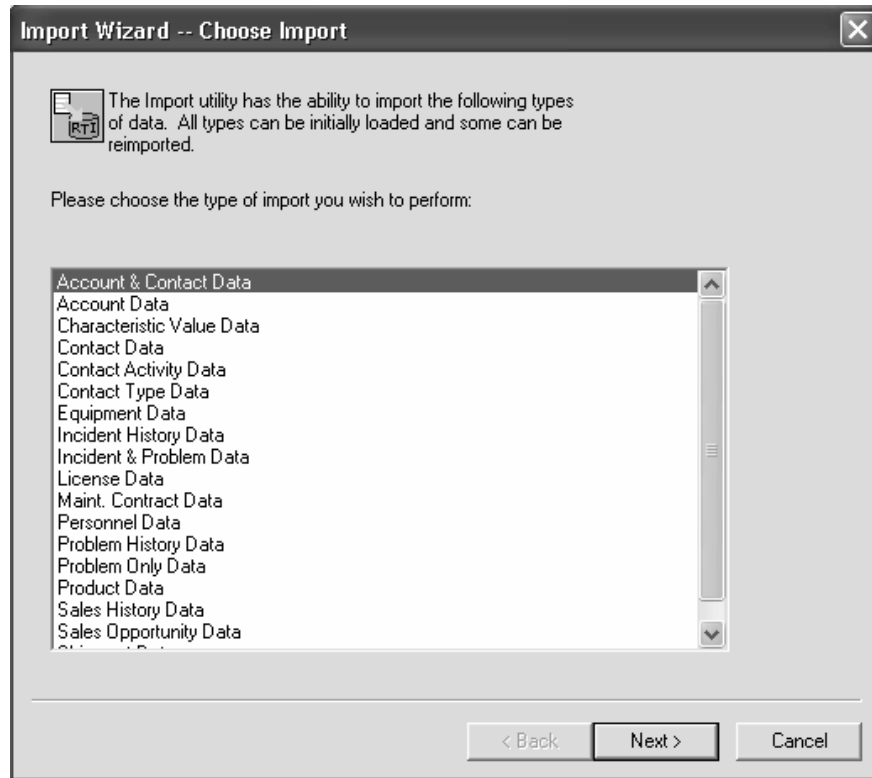
Access

From the *rtimp.exe*, select *File* and *Start Import Wizard* from the menu bar.

Choose Import Panel

This screen allows you to select the type of import to perform.

Panel Layout



Panel Elements

List

The available imports are displayed. Highlight the import you want to perform.

Panel Button Controls

Next

Displays the Other Import Options screen.

Cancel

Closes the Import Wizard panel.

Other Import Options Panel

This panel provides several options for your import. Other options may be available for specific imports. This is the Import Options panel for the Account import.

Panel Layout



Panel Elements

Stop on error

If this option is chosen, the import will stop if there is an error. If this option is not chosen, the import will skip any records with errors and attempt to continue the import. The errors are logged in rtiimp.log.

Do as a single transaction

If this option is chosen, no information is put into the database until the end of the import file has been reached and all data has been verified as correct. If you are importing more than a few hundred records this option is not recommended.

Perform re-import

If this option is selected, current information in the database will be updated from the import file. This option is only available for some of the imports. If the option does not apply to the import that you have selected, this check box is disabled.

Update address information if match is found

This option is only visible for the Account import, Account & Contact import, and Contact import. If this option is selected, the account and/or contact address lines will be updated if an existing account or contact is found in the database.

Check for existing accounts in

This option is only visible for the Account import and the Account & Contact import. When the system is looking for an existing account during the import process, this indicates whether the same Country, same State/Prov, and/or same City should be used in the comparison.

Increment Number of Users when importing license

This option is only visible for the License import. If this option is selected, and the user is performing a re-import that includes the *License Id*, *Product*, *Customer Name*, and *Number Of Users* fields, the number of users will be increased by the number identified in the import file.

Panel Button Controls**Back**

Takes user back to the Choose Import screen.

Next

Displays the Select Import File screen.

Cancel

Closes the Import Wizard panel.

Select Import File Panel

The Select Import File screen prompts you to choose the file that contains the data to import.

Panel Layout

Import Wizard -- Select Import File

The import file contains the data to import into the database. You can accept the default layout or define your own layout in the next step.

The default column delimiter is Comma, if the import file is using different column delimiter, please specify it.

Please select the import file:

File Format:

Column Delimiter (Comma is default):

Date Format (MM/DD/YY is default):

Select Template File: (Only if you do not want the one at default location)

< Back Next > Cancel

Panel Elements

Please select the import file

The name of the import file. You can type the file name or press the *Browse* button to select the file.

Browse button

Displays the Open pop-up box to allow you to select the file to import.

File Format

Allows the user to select the type file; either 'Text File' or 'XML File'.

Column Delimiter (Comma is default)

Allows the user to select the type of delimiter used in the import file.

Date Format (MM/DD/YY is default)

The date format that is to be used with the import. If XML File is selected in the *File Format* field, this field is disabled.

Select Template File

Allows the user to identify the specific template file that should be used. This allows you to select a previously created .tpc file. The full path for the template file must be provided. If the template provided does not contain the valid template information for the selected import type, then the default template for the import type will be used.

Browse button

Displays the Open pop-up box to allow you to select an existing template file.

Panel Button Controls**Back**

Takes user back to the Other Import Options screen.

Next

Displays the Choose Layout screen.

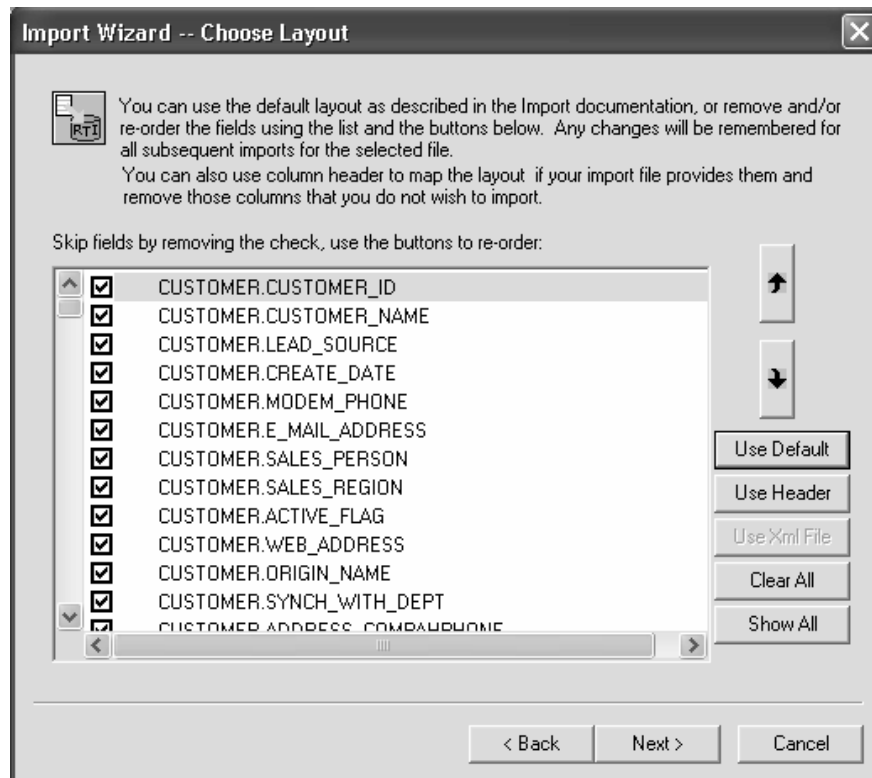
Cancel

Closes the Import Wizard panel.

Choose Layout Panel

The Choose Layout panel lists the fields that can be imported for the selected import. In this example the layout is for the Account Import. Refer to the documentation for each specific type of import for special processing associated with some of the fields.

Panel Layout



Panel Elements

List

Displays a list of the fields that can be imported for the selected import. If the check box to the left of the field name is marked, the field will be imported. Click on the box to add or remove the check mark.

List Button Controls

Arrows

The arrow buttons allow you to choose the order of the imported data fields by moving the highlighted field up or down in the list. This provides extra flexibility in creating the import file.

Use Default

Checks all fields and puts the fields back into their default order.

Use Header

Displays the Mapping Import Layout Using Column Header pop-up box. This allows you to map the column headers in the import file to specific fields.

Use XML File

Allows the user to import data from an XML file.

Clear All

This button deselects all fields by removing the checkbox in front of each field.

Show All

This button displays all available fields. The current fields that are selected are not deselected. If a specific *Template File* was selected, this allows the user to select additional fields that were not included in that template.

Panel Button Controls**Back**

Takes user back to the Select Import File screen.

Next

Displays the Import Data Preview screen.

Cancel

Closes the Import Wizard panel.

Mapping Import Layout Using Column Header Pop-Up Box

You can use the Mapping Import Layout Using the Column Header panel to map the data in the import file to specific fields. An *.itr file is then created. This file contains the mapped data from the import file with quotation marks around each field. This is the file that is used for the actual import. This file is stored in the directory where the original import file is located.

Pop-Up Box Layout

Mapping import layout using column header

To associate column header with import field name, select a Column header name from dropdown or from List of columns to be imported, then select an Import field name. Remove column you do not want to import from the list.

Column header name:

Import field name:

List of columns to be imported: Number of entries: 7

Column Header Name	Rows with data	Import Field Name
Name	3	
Address 1	3	
Address 2	3	
Address 3	1	
City	3	
State	3	
Zip	3	

Buttons: Associate, Remove, OK, Cancel

Pop-Up Box Elements

Associate Columns/Headers

Column header name

Displays a list of the column headers that appear in the import file.

Import field name

Displays a list of the fields available for this import to allow you to map the column headers to a field in the import.

Associate button

Associates the column listed in the *Column header name* field with the *Import field name* field.

List of columns to be imported list box

Displays a list of all the columns in the import file. This list box also displays the number of rows in the import file that contain data for each column. If there is a column that contains 0 (zero) rows, use the Remove button to delete the column.

Number of Entries

Displays the number of rows that appear in the list box.

Remove button

Deletes the selected association between the *Column header name* field and the *Import field name* field in the list box.

Panel Button Controls**OK**

Closes the panel and saves the field mapping.

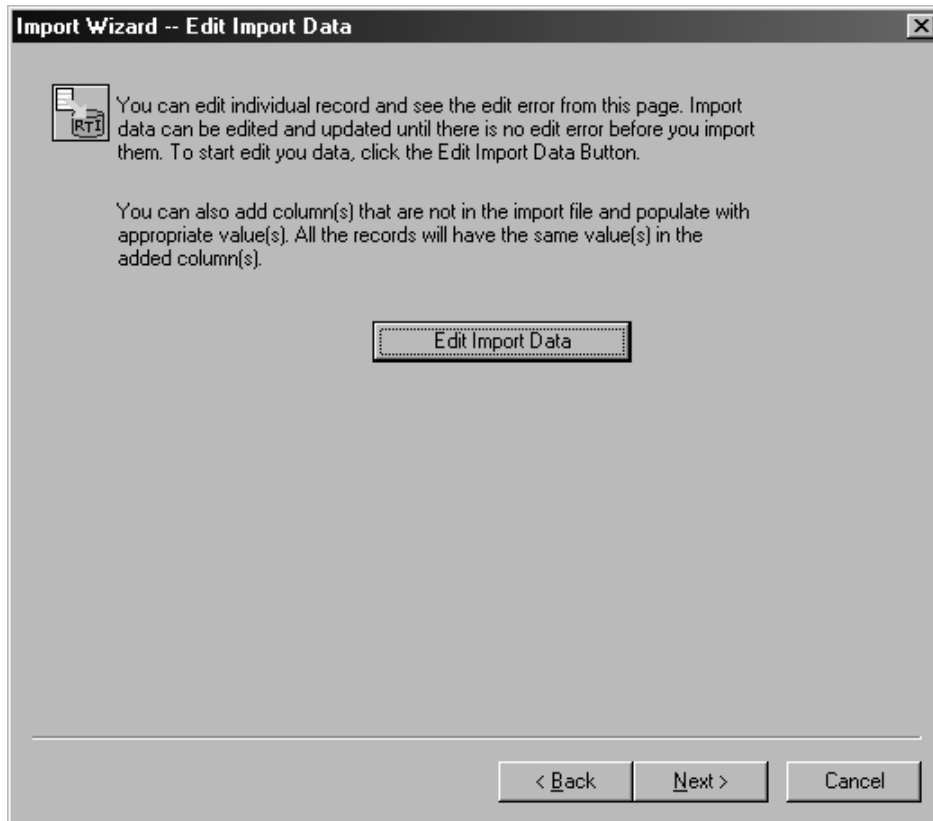
Cancel

Closes the panel without saving any of the field mapping.

Edit Import Data (Wizard) Panel

This panel give the user the option to update the data to be import directly from the Import Wizard.

Panel Layout



Panel Elements

Panel Button Controls

Edit Import Data

Displays the Edit Import Data pop-up box to allow the user to update the data to be imported.

Back

Displays the Choose Layout panel.

Next

Displays the Import Data Preview panel.

Cancel

Closes the panel without saving any of the changes.

Edit Import Data (Edit) Pop-Up Box

This panel allows the user to view the data in the import file and update the data before it is imported into the system. This panel also allows you to check the line items before they are imported to find any errors that might occur.

Pop-Up Box Layout

Edit Import Data

Buttons: Edit Selected Row, Update Column Values, Add Column(s)

Data To Be Imported:

CUSTOMER.CUSTOMER_NAME	MAILING_ADDRESS.ADDRESS_LINE1	MAILING_ADDRESS.ST
Customer A	123 S. Main St.	IL
Customer B	456 North Avenue	MI

Edit Message:

OK

Pop-Up Box Elements

Data To Be Imported List Box

Displays the data that is currently set to be imported.

List Box Button Controls

Edit Selected Row

When this button is clicked, the system will check for any errors that were found with the data for the selected line item in the *Data To Be Imported* list box.

Update Column Values

Displays the Edit Input Column Values panel to allow the user to update the data contained in the import file.

Add Column(s)

Displays the Add Column To Import pop-up box to allow the user to insert a new column into the import file.

Related Information**Edit Message**

This field displays any error messages that were found with the data when the user highlights a line item in the *Original Data From the Import File* list box and clicks the *Edit Selected Row* button.

Panel Button Controls**OK**

Saves the changes and closes the panel.

Edit Input Column Values Pop-Up Box

This panel allows the user to update the data that appears in the import file directly within the Import Wizard.

Pop-Up Box Layout

Pop-Up Box Elements

Import Field Name

This drop down list field contains a list of all the column headers that appear in the import file.

Unique Value(s) of Selected Column list box

Displays a list of all the unique values that appear in the import file for the field name selected in the *Import Field Name* field.

Old Value

The current value of the item selected in the *Unique Value(s) of Selected Column* list box.

New Value

Defaults to the value that appears in the *Old Value* field. The user can enter the new value that they wish to be imported in this field.

Add to List button

Clicking this button causes the data in the *New Value* field to be added to the *List of Column(s) Whose Value To Be Converted* list box.

List of Column(s) Whose Value To Be Converted

Displays a list of the columns that will be changed in the import file before the data is imported.

Remove button

Removes the item selected in the *List of Column(s) Whose Value To Be Converted* list box.

Panel Button Controls**OK**

Closes the panel and converts the data that is contained in the *List of Column(s) Whose Value To Be Converted* list box. The user will receive a pop-up message asking to confirm that the changes should be made to the data.

Cancel

Closes the panel without saving any changes.

Add Column To Import Pop-Up Box

This pop-up box allows the user to insert a new column into the file to be imported. Any columns that you add to the import file in this manner will apply to all records in the import file.

Pop-Up Box Layout

Column Name	Column Value
-------------	--------------

Pop-Up Box Elements

Column Name

This is the name of the column (field) that you want to insert.

Column Value

This is the value that will be added for each record for the selected *Column Name*. If you select a *Column Name* that is populated from the Code table (drop down field), you will see the values for selection in this field.

Button Controls

Add

Adds the selected *Column Name* and *Column Value* combination into the List of Added Column Value(s) list box.

Remove

Removes the selected *Column Name* and *Column Value* combination from the List of Added Column Value(s) list box.

OK

Closes the pop-up box and saves any changes made.

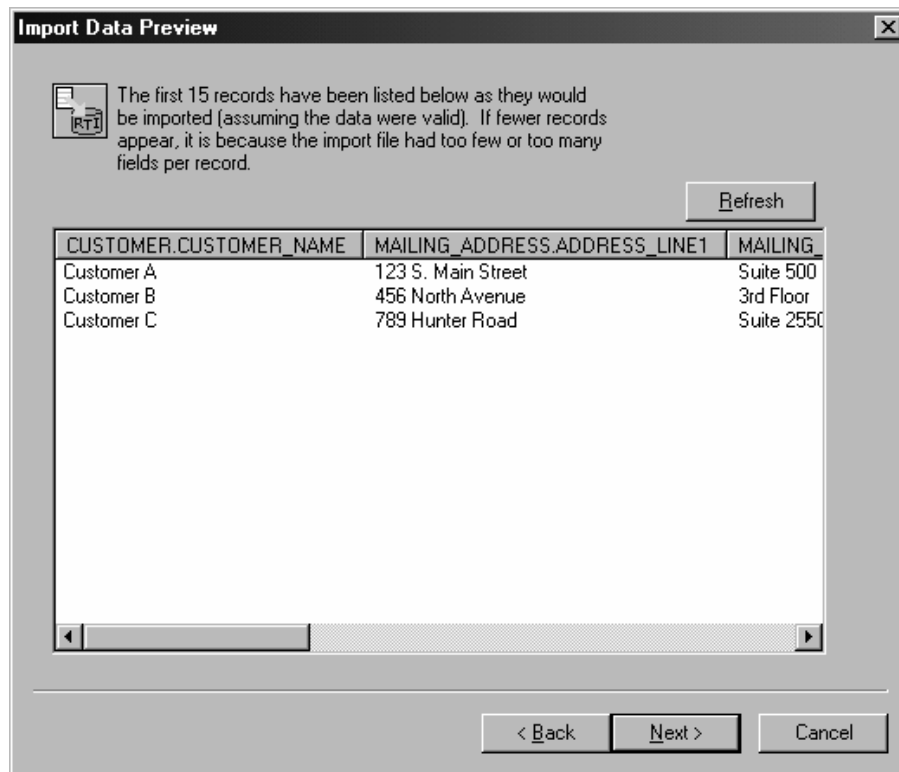
Cancel

Closes the pop-up box without saving any changes.

Import Data Preview Panel

The Import Data Preview panel allows you to quickly validate that at least a portion of your import file conforms to the layout identified in the previous step. This step does NOT attempt to validate the data; it only checks to see if you have supplied the correct number of columns in each record.

Panel Layout



Panel Elements

List

Displays a list of the first 15 records (or all records if there are less than 15 being imported) in the import file.

Refresh button

If you see a problem, you can fix your import file and then press this button to re-check, or you can go back and change the layout itself.

Panel Button Controls

Back

Takes the user to the Choose Layout screen.

Next

Displays the Other Import Options screen.

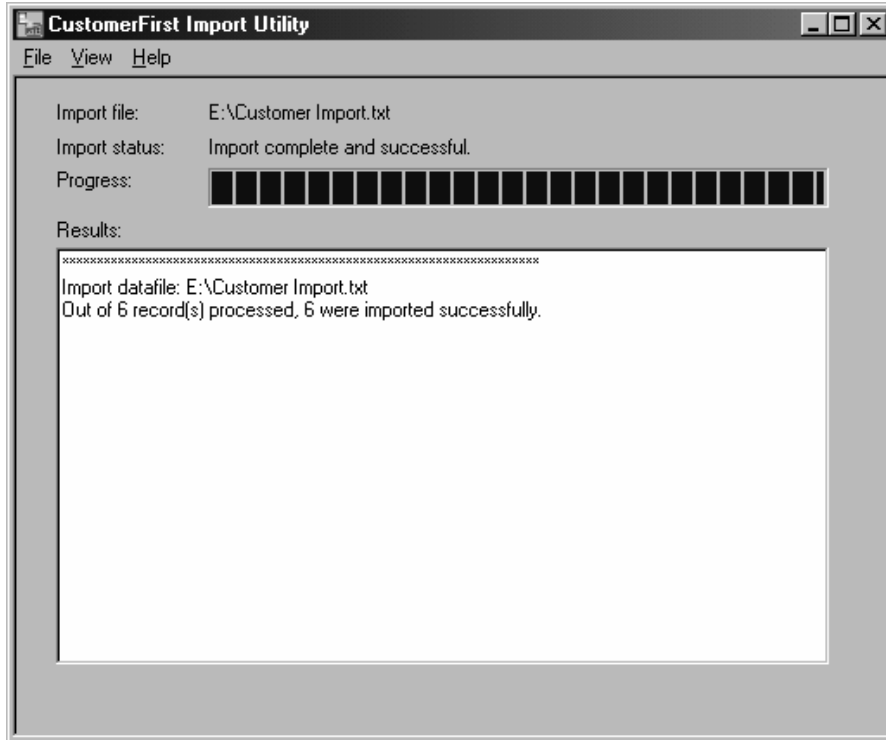
Cancel

Closes the Import Wizard panel.

Import Utility

The *CustomerFirst* Import Utility panel displays any errors encountered during the import and identifies the import's progress.

Panel Layout



Running Imports from the Command Line

Specific parameters must be provided in order to run the import utility directly from the command line. Other parameters are optional.

There must be a predefined template file that matches the columns in the data file you are trying to import and matches the file name of the data file. To create this template file, do a regular import using Import Wizard first. A template file that has the same name as the data file name will be created for each import if a template file with that name does not exist. After you do the first import, you will be able to invoke the import from the command line directly. Keep in mind that the data file name must be kept the same for the next import (The data file can reside in different folder). For different import types, use a different data file name to avoid overwriting the template files. If you do the same type of import with different columns, it is better to use different data file names so that you will have different template files created for you.

Formatting

```
C:\rti\rtiimp.exe -dxxx -sxxx -uxxx -pxxx -fxxx -txxx -hide
```

The parameters can be in any order.

Parameters

- -d (-D) : xxx is the Database name to which we are trying to import data. This is required.
- -s (-S) : xxx is the Server name. This is required.
- -u (-U) : xxx is the User name to access the database. This is required.
- -p (-P) : xxx is the Password to access the database. This is required.
- -t (-T) : xxx is the import type. It must be presented as an integer number. It is the sequence number of import type on Choose Import page of Import Wizard. e.g., the Customer Data import will be 1, the contact data will be 2, the Contact Type data will be 3, etc. This is required.
- -f (-F) : xxx is the file name of the file we are trying to import. The file name must contain the full path of the file. If there is any space in the file name, it must be double quoted. This is required.
- -m (-M) : This parameter allows you to identify the date format used in the import file. Valid values are MM/DD/YY or MM/DD/YYYY or DD/MM/YY or DD/MM/YYYY. For example, you can specify -mDD/MM/YYYY to indicate a date format you want to use. The value is case insensitive. If this parameter is not specified, the import will use the default date format which is MM/DD/YY. This parameter cannot be used with an XML file.
- -e (-E) : This option allows you to identify the specific template file that should be used. The full path for the template file must be provided. No spaces should be in between the option and the file name. If the template provided does not contain the valid template information for the selected import type, then the default template for the import type will be used.

- -r (-R) : This parameter is associated with the “Perform re-import” check box on the Other Import Options screen in the Import Wizard. This indicates that the import is a re-import and is required for a re-import.
- -h (-H) : This parameter is associated with the “Stop on error” check box on the Other Import Options screen in the Import Wizard. If this parameter is included, the import will stop for each error. If this parameter is used, user intervention may be required during the import.
- -o (-O) : This parameter is associated with the “Do as single transaction” check box on the Other Import Options screen in Import Wizard. If this parameter is included, the import will be performed as single transaction and the records will not be updated until the end of the import. If this parameter is used, user intervention may be required during the import.
- -hide (-HIDE) : If this parameter is included, the import program will be closed automatically when it has completed.
- -a (-A) : This parameter is associated with the “Update Address Lines if Name, City, and State match” option that is available on the Other Import Options screen in the Import Wizard. This option is available for the Customer import, Customer & Contact import, and the Contact import. If this parameter is included, the customer and/or contact address information will be updated as defined for the specific import. If the parameter is not provided, the address information will not be updated.
- -l (-L) :x is ‘Y’ or ‘any other value’. This parameter is associated with a pop-up that appears for the License import and asks the following: "If the Refresh_Name is not specified, do you want the latest refresh to be shipped to the customer?" If a ‘Y’ is provided with the parameter, the program will automatically ship the latest refresh in the Product_Refresh table to the customer for each record in the import data where Refresh_Name is left blank. If any other value is provided with the parameter, no refresh will be shipped to the customer. If the parameter is not included, the pop-up message will be displayed during the import.
- -i (-I) : This parameter is associated with the “Increment Number of Users when importing license” option that is available on the Other Import Options screen in the Import Wizard. This option is only available for a License re-import. If this parameter is provided, and the import file includes the License.License_Number or License.Source_License_Id, and License_Item.Product_Name, License_Item.Cust_Name, and License_Item.Number_Of_Users fields, the number of users will be increased by the number identified in the import file. If the parameter is not provided, the Number of Users will not be incremented; rather the value will be replaced with the new one.

Appendix A



Codes



Appendix A



Codes



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Codes Description

The following is a list of the codes used by the system. These codes are maintained from the Maintain Codes/Code Types panel within the System Administration executable. If the code is described as "User defined", the user can define any values for that code. If the code is described as "Cannot be modified", then only the *Short Value* and *Long Value* can be changed; the *Internal Value* must remain unchanged.

Acquisition_Basis

User defined.

Primary location: Ship Product to Account pop-up box

Act_Status_Id

User defined.

Primary location: Main tab of the Account Information panel

Address_Misc1-2_Id

User defined.

Primary location: Main tab of the Account Information and Contact panels

Billing_Code_Id

User defined.

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

Primary location: Incident, Problem, and Task Activity and Time Entry pop-up boxes

Camp_Category_Id

User defined.

Primary location: Main tab of the Campaign panel

Camp_Phse_Misc1-2_Id

User defined.

Primary location: Misc. tab of the Campaign Phase panel

Camp_Status_Id

User defined.

Primary location: Main tab of the Campaign panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Active (ACTV)

Closed (CLOS)

Planned (INIT)

Camp_Type_Id

User defined.

Primary location: Main tab of the Campaign panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Marketing (MKTG)

Campaign_Misc1-2_Id

User defined.

Primary location: Misc. tab of the Campaign panel

Close_Reason_Id

User defined.

Primary location: Close Incident and Close Problem pop-up boxes

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Cannot Reproduce (CREP)
Customer Request (CREQ)
Internal Only (IONLY)
Other Vendor (VNDER)
Resolve by Characteristic (PRESL)
Resolution Supplied (RESL)

Competn_Misc1-8_Id

User defined.

Primary location: Misc. tab of the Competition panel

Contact_Type_Id

User defined.

Primary location: Product Interest pop-up box from the Account Contact panel

ContActv_Misc1-2_Id

User defined.

Primary location: Contact Activity pop-up box

CPU_Field_Id

User defined.

Primary location: CPU Characteristics pop-up box

CPU_Misc1-14_Id

User defined.

Primary location: Misc. tab of the CPU Information panel

Cred_Card_Type_Id

User defined.

Primary location: Incident Payment Information pop-up box from the Incident panel

Credit_Status_Id

User defined.

Primary location: Details tab of the Account Information panel

Cust_Cont_Misc1-16_Id

User defined.

Primary location: Misc. tab of the Account Contact panel

Cust_Has_Prod1-2_Id

User defined.

Primary location: Ship Product to Account and Update Account's Product pop-up boxes

Cust_MultMisc1-4_Id

User defined.

Primary location: Misc. tab of the Account Information panel

Cust_Prod_Stat_Id

User-defined

Primary location: Ship Product to Account and Update Account's Product pop-up boxes

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Inactive (INACT)

Customer_Misc1-22_Id

User defined.

Primary location: Misc. tab of the Account Information panel

Custprg_Misc1-2_Id

User defined.

Primary location: Product Customization pop-up box from the Account Information panel

Department_Type_Id

User defined.

Primary location: Company Department panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Account (ACCT)

Client Services (CS)
Development (DEV)
Sales (SALES)
Other (OTH)

Distrib_Media_Id

User defined.

Primary location: Main tab of the License Information panel

Equ_Field_Id

User defined.

Primary location: Equipment Characteristics pop-up box from the Equipment Information panel

Equip_Oper_Stat_Id

Primary location: Main tab of the Equipment Information panel

The following are the system default values for this code type:

Down (DOWN)
Normal (NORM)
Not Being Used (NOUSE)

Equip_Status_Id

Primary location: Main tab of the Equipment Information panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

In-transit (INTRN)
Installed at user site (INUSE)
Inventory (INV)
Obsolete (OBS)
Purchase (PURCH)
Return from Repair (RETRN)
Being Repaired (RPAIR)

Equipment_Misc1-16_Id

User defined.

Primary location: Misc. tab of the Equipment Information panel

Equipment_Owner_Id

User defined.

Primary location: Main tab of the Equipment Information panel

Equipment_Type_Id

User defined.

Primary location: Main tab of the Equipment Information panel

Escrow_Type_Id

User defined.

Primary location: Main tab of the License Information panel

File_Type_Id

User defined.

Primary location: Temporary Fix Component pop-up box from the Temporary Fix panel

Group_Misc1-2_Id

User defined.

Primary location: Misc. tab of the Group Information panel

Hdl_Status_Id

User defined.

Primary location: Main tab of the Account Information panel

Inc_Activity_Id

User defined.

Primary location: Incident Activity and Incident Time Entry pop-up boxes

There is specific processing for certain internal values and code ids associated with this code type.

Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Attachment (ATTAC)
- Call (CALL)
- E-Mail In (EMAIL)
- E-Mail Out (CALL)
- E-Mail Internal (EMAIL)
- Fix Failure Notice (FFAIL)
- Meeting (MEETG)
- Message (MESSG)
- Queue Date for Status (QUEUE)
- Received Documentation (RCDOC)
- Research (RESCH)

Inc_Hist_Misc1-2_Id

User defined.

Primary location: Incident Activity and Incident Time Entry pop-up boxes

Incident_Misc1-20_Id

User defined.

Primary location: Misc. 1 and Misc. 2 tabs of the Incident panel

Incident_Status_Id

Cannot be modified except for adding a new status with the internal type of UCLOS, UOPEN, or UWAIT.

Primary location: Main tab of the Incident panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Active (ACTV)
- Closed (CLOS)
- Initial (INIT)
- Negative Verification (NVER)
- Respond to Customer (RESP)
- Temporary Fix Required (TFIX)
- Waiting for Information (ADOC)
- Waiting for Resolution (ARES)
- Waiting for Task (ATASK)
- Waiting for Temporary Fix (AFIX)
- Waiting for Verification (AVER)

Industry_Code_Id

User defined.

Primary location: Main tab of the Account Information panel

Introduced_In_Id

User defined.

Primary location: Main tab of the Problem panel

Lic_Category_Id

User defined.

Primary location: Main tab of the License Information panel

Lic_Field_Id

User defined.

Primary location: License Characteristics pop-up box from the License Information panel

Lic_Item_Misc1-6_Id

User defined.

Primary location: Add/Update Licensed Product pop-up box from the License Information panel

License_Misc1-8_Id

User defined.

Primary location: Misc. tab of the License Information panel

License_Type_Id

User defined.

Primary location: Main tab of the License Information panel

The following are the system default values for this code type:

- Standard (STD)

Lost_Reason_Id

User defined.

Primary location: Sales Activity pop-up box

The following are the system default values for this code type:

No Budget (SNOBD)

Lost to Competition (SLCOM)

Maint_Misc1-4_Id

User defined.

Primary location: Misc. tab of the Maintenance Contract panel

Manual_Id

User defined.

Primary location: Documentation References pop-up box from the Incident panel

MC_Price_Misc1-3_Id

User defined.

Primary location: Update Price pop-up box from the Maintenance Contract panel

MC_Renew_Misc1-2_Id

User defined.

Primary location: Add/Update Maintenance Contract Renewal pop-up box from the Maintenance Contract panel

MC_Renew_Stat_Id

User defined.

Primary location: Add/Update Maintenance Contract Renewal pop-up box from the Maintenance Contract panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Paid (PAID)

Pending (PEND)

Invoiced (INV)

Module_Misc1_Id

User defined.

Primary location: Permanent Fix Module pop-up box from the Permanent Fix panel

Module_Type_Id

User defined.

Primary location: Permanent Fix Module pop-up box from the Permanent Fix panel

Name_Title_Id

User defined.

Primary location: Main tab of the Account Contact panel

National_Lang_Id

User defined.

Primary location: Product Implementation pop-up box from the Product Information panel

NoCharge_Type_Id

User defined.

Primary location: Non-Chargeable Time Entry pop-up box from the Individual Time Summary panel

The following are the system default values for this code type:

- Holiday (HOLID)
- Illness (ILLNE)
- Vacation (VACAT)

Oper_Sys_Id

User defined.

Primary location: Product Implementation pop-up box from the Product Information panel

Outcome_Id

User defined.

Primary location: Contact Activity pop-up box

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Left_Message (LM)
- Negative Response (NEG)
- Positive Response (POS)
- Undelivered (UNDEL)

Perm_Fix_Misc1-8_Id

User defined.

Primary location: Misc. tab of the Permanent Fix panel

Perm_Fix_Status_Id

Cannot be modified.

Primary location: Main tab of the Permanent Fix Product Version/Impl. pop-up box from the Permanent Fix panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Pending (PEND)
- Incorp - QA Test (INCPA)

Incorp - Beta (INCPB)
Incorp - General (INCRP)
Not Required (NOTRQ)
Not Fixing (NOTFX)

Pers_Misc 1-4_Id

User defined.
Primary location: Misc. tab of the Company Personnel panel

Personnel_Role_Id

User defined.
Primary location: Main tab of the Company Personnel panel and the Participant panel

PFix_In_Misc1-3_Id

User defined.
Primary location: Found on the Permanent Fix Product Version/Impl. pop-up box from the Permanent Fix panel

Phase_Status_Id

Cannot be modified except for adding a new status with the internal type of UCLOS or UOPEN.
Primary location: Main tab of the Campaign Phase panel
There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.
The following are the system default values for this code type:

Active (ACTV)
Closed (CLOS)
Planned (INIT)

Phase_Type_Id

User defined.
Primary location: Main tab of the Campaign Phase panel
There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.
The following are the system default values for this code type:

E-Mail (EMAIL)
Fax (FAX)
Phone (PHONE)
Postal Mail (PMAIL)
Other (OTHER)

Prb_Activity_Id

User defined.
Primary location: Problem Activity and Problem Time Entry pop-up boxes
There is specific processing for certain internal values and code ids associated with this code type. Refer to the Define Field Values section of this manual for more information.
The following are the system default values for this code type:

Attachment (ATTAC)
Call (CALL)
E-Mail In (EMAIL)
E-Mail Internal (EMAIL)
Meeting (MEETG)
Research (RESCH)
Queue Date for Status (QUEUE)

Priority_Id

User defined.

The *Long Value* and *Short Value* for the Internal Value 'MED' can be changed but the *Internal Value* cannot.

Primary location: Main tab of Incident, Problem, and Account Information panels

The following are the system default values for this code type:

Hot (HOT)
High (HIGH)
Medium (MED)
Low (LOW)

Prob_Assc_Type_Id

User defined.

Primary location: Associate Problem pop-up box from Problem panel

The following are the system default values for this code type:

Not Required (NOTRQ)
Required (REQRD)

Problem_Misc1-16_Id

User defined.

Primary location: Misc tab of the Problem panel

Problem_Status_Id

Cannot be modified except for adding a new status with the internal type of UCLOS, UOPEN, or UWAIT.

Primary location: Main tab of the Problem panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Active (ACTV)
Closed (CLOS)
Resolved (RESV)
Waiting for Information (ADOC)
Waiting for Task (ATASK)

Problem_Type_Id

User defined.

Primary location: Main tab of the Incident and Problem panels

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.
The following are the system default values for this code type:

- Documentation Issue (DCERR)
- Enhancement Request (ENHRQ)
- Product Defect (SFTWR)
- Question (QUEST)

Prod_Ref_Misc1-2_Id

User defined.

Primary location: Product Refresh Level pop-up box

Product_Family_Id

User defined.

Primary location: Main tab of the Product Information panel

Product_Lit_Id

User defined.

Primary location: Send Collateral pop-up box and the Main tab of the Campaign Phase panel

Product_Misc1-4_Id

User defined.

Primary location: Misc. tab of Product Information panel

Program_Type_Id

User defined.

Primary location: Product Program and Product Customization pop-up boxes

Progrm_Category_Id

User defined.

Primary location: Product Program pop-up box

Proj_Category_Id

User defined.

Primary location: Add/Update Projection pop-up box from the Sales Opportunity panel

Project_Id

User defined.

Primary location: Details tab of the Incident panel and the Main tab of the Problem panel

Purpose_Id

User defined.

Primary location: Contact Activity pop-up box

The following are the system default values for this code type:

Marketing Campaign (MCAMP)

Query_Misc_1-2_Id

User defined.

Primary location: Save Query pop-up box from an ad-hoc search panel

Ref_Category_Id

Cannot be modified.

Primary location: Product Refresh Level pop-up box from the Product Information panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Alpha (A)
- Beta (B)
- General (G)

Remove_BegChar_Id

User Defined.

Values defined for Remove_BegChar_id field will be removed from the *Account Name* when looking for an existing account if followed by a comma or a space. Some system defined values are provided for this code type.

Remove_EndChar_Id

User Defined.

Values defined for Remove_EndChar_id field will be removed from the *Account Name* when looking for an existing account if preceded by a comma or a space. Some system defined values are provided for this code type.

Relation_Type_Id

User defined.

Primary location: Account Relationships pop-up box from the Account Information panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Consultant (CONSL)
- Primary Support Person (PRIMR)
- Salesperson (SALEP)
- Sales Region (SALER)
- Support Center (SALEC)

Response_Id

User defined.

Primary location: Responded pop-up box from the Campaign Phase panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Negative Response (NEG)
Positive Response (POS)

Role_Influence_Id

User defined.

Primary location: Contacts/Roles pop-up box from Sales Opportunity panel

The following are the system default values for this code type:

Major (MAJOR)
Moderate (MODER)
Minimal (MIN)
None (NONE)

Role_Misc1_Id

User defined.

Primary location: Contacts/Roles pop-up box from Sales Opportunity panel

Role_Viewpoint_Id

User defined.

Primary location: Contacts/Roles pop-up box from Sales Opportunity panel

The following are the system default values for this code type:

Negative Response (NEG)
Positive Response (POS)

RTI_Note_Type_Id

User defined.

Primary location: Add/Update Account (Contact) Note pop-up box

Sales_Opp_Type_Id

User defined.

Primary location: Main tab of the Sales Opportunity panel

Sales_Stage_Id

User defined.

Primary location: Main tab of the Sales Opportunity panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Canceled (CANCL)
Lost (LOST)
Won (WON)

Sales_Status_Id

User defined.

Primary location: Main tab of the Account Information panel
There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information
The following are the system default values for this code type:

Inactive (INACT)
Not Visible in CFS (NOCFS)

Severity_Id

User defined.

Primary location: Main tab of the Incident, Problem, and Task Entry panels

The following are the system default values for this code type:

Critical Impact (CRASH)
Major Impact (MAJOR)
Minor Impact (MINOR)

Ship_Method_Id

User defined.

Primary location: Send Collateral pop-up box

SIs_Activity_Id

User defined.

Primary location: Sales Activity and Contact Activity pop-up box

There is specific processing for certain internal values and code ids associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Attachment (ATTAC)
Call (CALL)
E-Mail In (_MAIL)
E-Mail Out (CALL)
Message (MESSG)
Schedule Tickler (SCHED)

SIs_Priority_Id

User defined.

Primary location: Main tab of the Sales Opportunity panel

SIsOp_Misc1-16_Id

User defined.

Primary location: Misc. tab of the Sales Opportunity panel

SIsP_Dtl_Misc1-5_Id

User defined.

Primary location: Add/Update Projection pop-up box from the Sales Opportunity panel

Source_Id

User defined.

Primary location: Close Incident pop-up box

Suffix_Id

User defined.

Primary location: Main tab of the Account Contact panel

Target_Release_Id

User defined.

Primary location: Main tab of the Problem panel

Task_Activity_Id

User defined.

Primary location: Task Activity pop-up box

There is specific processing for certain code ids associated with this code type. Refer to the Define Field Values section of this manual for more information

The following are the system default values for this code type:

- Attachment (ATTAC)
- Call (CALL)
- E-Mail In (EMAIL)
- E-Mail Out (CALL)
- E-Mail Internal (EMAIL)
- Meeting (MEETG)
- Research (RESCH)

Task_Misc1-16_Id

User defined.

Primary location: Misc. 1 and Misc. 2 tabs of the Task Entry panel.

Task_Status_Id

Cannot be modified except for adding a new status with the internal type of UCLOS, UOPEN, UWAIT, or UINIT.

Primary location: Main tab of the Task Entry panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

- Active (ACTV)
- Closed (CLOS)
- Planned (INIT)
- Waiting for Information (ADOC)

Task_Type_Id

User defined.

Primary location: Main tab of the Task Entry panel

The following are the system default values for this code type:

Ship Product (SHIP)

Temp_Fix_Misc1-8_Id

User defined.

Primary location: Misc tab of the Temporary Fix panel

Temp_Fix_Stat_Id

User defined.

Primary location: Main tab of the Temporary Fix panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Active (ACTV)

Closed (CLOS)

TFix_Comp_Misc1-2_Id

User defined.

Primary location: Temporary Fix Component pop-up box from the Temporary Fix panel

Tick_Priority_Id

User defined.

Primary location: Add Tickler, Update Tickler, Contact Activity, and the Sales Activity pop-up boxes

The following are the system default values for this code type:

Hot (HOT)

High (HIGH)

Medium (MED)

Low (LOW)

Tickler_Action_Id

User defined.

Primary location: Add Tickler, Update Tickler, Contact Activity, and the Sales Activity pop-up boxes

The following are the system default values for this code type:

Call (CALL)

Time_Zone_Id

User defined.

Primary location: Account Information and Account Contact panels

The following are the system default values for this code type:

Eastern (10)

Eastern (No Daylight Savings) (34)

Central (11)

Mountain (US & Canada) (12)

Mountain (No Daylight Savings) (38)

Pacific (13)
Alaska (14)
Hawaii (15)

TP_Monitor_Id

User defined.

Primary location: Product Implementation pop-up box from the Product Information panel

Type_Of_User_Id

User defined.

Primary location: Add/Update Licensed Product pop-up box from the License Information panel

User_Cls_Name_Id

User defined.

Primary location: Company Personnel panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Administrator (ADMIN)
Developer (DEV)
Manager (MGR)
Operator (OPER)
Sales Person (SALES)
Support Analyst (SUPRT)
WebFirst (WFS)

User_Group_Id

User defined.

Primary location: Company Personnel panel

There is specific processing for certain internal values associated with this code type. Refer to the Define Field Values section of this manual for more information.

The following are the system default values for this code type:

Global (GUG)
WebFirst (WFS)

