

Chapter 02 : Object Management Pages (OMPs)

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What is an Object Management Page (OMP)?

An Object Management Page (OMP) is a key component of our software that allows users to perform various operations on specific types of objects within the system. These operations typically include creating, updating, and deleting objects.

Key Features of an OMP

Creation : An OMP provides a user-friendly interface for creating new objects in the system. This usually involves filling out a form with the necessary details about the object.

Updating : OMPs allow users to modify existing objects. This could involve changing the values of certain attributes, adding new information, or even changing the status of the object.

Deletion : If an object is no longer needed, OMPs provide a straightforward way for users to remove these objects from the system.

Common Elements of an OMP

While the specific layout and features of an OMP can vary depending on the type of object it manages, most OMPs share some common elements:

Navigation Menu: This allows users to switch between different sections of the OMP, such as the creation form, the update form, or the deletion form.

Form Fields: These are where users input the data for the object. The number and type of fields will depend on the attributes of the object.

Action Buttons: These buttons trigger actions such as “Save”, “Update”, or “Delete”.

Feedback Messages: After an action is performed, the OMP will display a message informing the user whether the action was successful or not.

In conclusion, an Object Management Page (OMP) is a crucial part of our software that enables users to manage the lifecycle of objects within the system. By understanding how to use an OMP, users can effectively interact with and manipulate the objects in the system.

Guide to page sections for Object Management Pages (OMPs).

An Object Management Page (OMP) has 4 main sections :

- **Toolbar** : Usually positioned at the page's top, the toolbar offers rapid access to frequently used operations. All toolbar buttons have an icon and a label. The icon graphically signifies the button's function, simplifying the user's understanding of the action triggered by clicking the button. When the page is minimised, the button label is concealed, but icons remain visible at all times.
- **Blue ribbon** : Situated at the upper part of the page, directly beneath the toolbar. It is characterized by its blue background and extends across the entire width of the page. The blue ribbon incorporates the following types of inputs :
 - **Text inputs** : These rely on keyboard typing to filter the table. By default, the search action is initiated by typing while the input is focused. However, a setting exists to disable keypress searching, allowing searches only when the enter key is pressed. For more details on this keypress search disabling setting in an OMP, click [here](#).
 - **Select inputs** : These are activated by clicking the input, revealing a fixed set of options. The value for this input is chosen by clicking the desired option from the visible list.
 - **Hybrid inputs** : These inputs utilize both typing and selecting. Typing in these inputs filters the dropdown options. Once the desired dropdown option is located, the value for that input is selected by choosing one of the dropdowns. This selection is finalized by either pressing enter on the keyboard or using the mouse to click.
- **Table** : This section, situated just beneath the Blue ribbon on the right, is designed to display objects that correspond to the values entered in the Blue ribbon inputs. If no values are entered in the Blue ribbon inputs, the default setting populates the table with all objects from the database. However, there is a setting that can be modified so that an empty blue ribbon leads to an empty table. For more information on this setting, please click [here](#).

With each keypress or change in the Blue ribbon search input, the table adjusts to list only the objects that align with the Blue ribbon inputs. Depending on the page, the system attempts to match certain properties for each object to determine which ones remain in the table. The properties searched for vary by object type and typically include the object's name and number. Other objects may also match additional properties (e.g. in

the Patients OMP, the blue ribbon inputs also filter by medical aid membership numbers). At any given time, one object in the table may be highlighted in blue and bolded to indicate focus.

- **Form :** The form, situated directly below the blue ribbon on the right, plays a crucial role in the creation of new objects or the updating of existing ones, as it is where the necessary inputs for such information are found. The form section of the page contains at least one tab, similar to the arrangement of tabs in a Chrome browser. Each tab in the form for an OMP is a collection of related inputs.

Navigation from one tab to another can be achieved by clicking on the desired tab with a mouse, mirroring the navigation of tabs in a Chrome browser. Navigation from one input to the next can be accomplished by pressing the tab key on the keyboard. When using the tab key for navigation, pressing the tab key on the last input of a tab results in the opening of the next tab, with the first input in that tab automatically selected.

Pathways to pages: How to open the most frequently used OMPs.

The homepage features a menu bar positioned at the top. This menu bar provides access to various Object Management Pages (OMPs). To navigate to an OMP, click on the relevant top-level menu item. This action will reveal a dropdown menu, where most OMPs are listed as second-level menu items.

Below is a table with three columns for easy navigation:

- **Column 1:** Displays the label of the top-level menu item visible on the menu.
- **Column 2:** Shows the label of the second-level menu item that opens an OMP. Please note that this column does not list every item in the dropdown, but only those that lead to OMPs.
- **Column 3:** Lists common reasons for opening the corresponding OMP. Please note that the basic operations such as creating and deleting objects for the OMP will not be listed for any row as these are the most fundamental and obvious uses of an OMP.

This table serves as a quick reference guide to the most frequently used OMPs and their access points from the menu.

Top-level menu labels	Second-level	Most common reasons for opening the OMP
Currencies and banking	Currencies	Updating the exchange rate for a currency.
	Banking details	Enabling or disabling a set of banking details so as to include or exclude them from a document (i.e. quotation, invoice).
Employees	Employees	Updating the password for a user/employee who may have forgotten their login credentials.
Form settings	Forms	
	Form inputs	Enabling or disabling an input from a form.

	Form input elements	
Inventory	Inventory items	Updating the sales price for any inventory item.
	Inv. item categories	
Services	Services	Updating the sales prices for any service.
	Serv. categories	
Partners	Corporates	To view the statement for a particular corporate.
	Referrers	
	Suppliers	
Accounts	GL accounts list	
Medical aid	Claims	To submit a batch of claims online.
	Claim invoices	
	Society claim amounts	
	Society shortfalls	
	Society claim limits	
	Medical disciplines	

Pathways to pages: How to open the technical support OMPs.

There exists a unique set of Object Management Pages (OMPs) that are exclusively accessible to members of the technical support team. These pages can be accessed via the menu bar. To navigate to these pages, click on the **Preferences** item in the top-level menu. This action will reveal a dropdown menu, which includes an option labeled **Tech Support Tools**. Upon selecting Tech Support Tools, another dropdown will appear, from which you need to select **Tech Support Tables**. This final step will display a list of the technical support OMPs.

The table below provides a guide to these special OMPs. It consists of two columns:

- **Column 1:** Displays the label of the technical support OMP listed in the dropdown that appears after clicking *Preferences*, then *Tech Support Tools*, and finally *Tech Support Tables*.
- **Column 2:** Lists common reasons for opening the corresponding OMP. Please note that the basic operations such as creating and deleting objects for the OMP will not be listed for any row as these are the most fundamental and obvious uses of an OMP.

This table serves as a quick reference guide for technical support staff to navigate to their exclusive OMPs. Remember, the pathway to these OMPs is: **Preferences > Tech Support Tools > Tech Support Tables**.

Technical support OMPs	Common reasons for opening the OMP
Consultation forms	
Consumable tariff groups	
Medical aid societies	
Med aid society groups	
Patients page settings	

Payment buttons	
Scheduled X items	
Stamps	
Standard vitals	
Storerooms	
Terminal settings	
Wards	
X Item templates	

Adding a new object (Add toolbar button).

Before proceeding with the instructions in this OMP page it is crucial to familiarize yourself with the various **sections** of the page (i.e. **toolbar, blue ribbon, table and form**). If you are not yet acquainted with this information, please click [here](#).

The toolbar of the OMP, which generally comprises three distinct levels, displays only one level at any given time. The following is an overview of these levels along with the functions they typically encompass :

- **Level 1 (Add, Refresh) :** This level of the toolbar is active when no specific object is selected or in focus. It features buttons for general actions that are not tied to a specific object. By default, when an OMP is opened, the toolbar is set to Level 1.
- **Level 2 (Edit, Delete, Cancel) :** This level of the toolbar becomes active when a specific object is selected from the **table section**. The buttons that appear at this level, correspond to actions that are directly applied to the selected or focused object.
- **Level 3 (Save, Cancel) :** This level of the toolbar is activated when an object is in the process of being created or edited. It becomes visible either when an object is selected and editing commences, or when the Add toolbar button is clicked to initiate the creation of a new object. The primary function at this level is the Save toolbar button, which finalizes the creation or editing of an object. If you wish to discontinue the creation or editing process, you can use the Cancel toolbar button.

Instructions :

- Open the Object Management Page (OMP). Generally, the OMP for most object types can be accessed from the menu in the homepage. However, the method of launching may differ based on the specific type of object.
- Once the OMP is open with no object currently selected or in focus (indicating that the toolbar is at **level 1**), you should click on the Add toolbar button. After this step, the following actions will take place :
 - The toolbar transitions to **level 3**. This reveals the buttons that you will use to wrap up the creation or editing processes (i.e Save, Cancel).
 - The fields within the form section are activated. These fields/inputs are intended for specifying the various attributes of the object.
 - The table section is disabled, which means that no other object can be selected.
 - The search input in the Blue ribbon is disabled.

- Proceed through the form inputs, filling out all required inputs and any additional ones you choose to complete. For efficient navigation, use the **Tab** key on your keyboard to move forward from one field to the next, or the **Shift + Tab** key combination to go back to the previous field.
- After entering the necessary information, click the Save toolbar button. If there are any required fields left blank, the system will not save the object. Instead, it will draw attention to and focus on the unfilled required field. However, if all inputs are properly filled, the saving process will be successful. After this step, the following actions will take place :
 - The toolbar will transition to **level 2**. This brings up the buttons that are useful after you've selected or focused on a specific object (i.e Edit, Delete).
 - The form fields become inactive.
 - The table section becomes active.
 - The search input in the Blue ribbon is enabled.

Search to selection: How to find and choose an object within an OMP.

Before proceeding with the instructions in this OMP page it is crucial to familiarize yourself with the various **sections** of the page (i.e. **toolbar, blue ribbon, table and form**). If you are not yet acquainted with this information, please click [here](#).

Instructions :

1. Open the Object Management Page (OMP). Generally, the OMP for most object types can be accessed from the menu in the homepage. However, the method of launching may differ based on the specific type of object.
2. Locate an object in the table section by entering a search term into the search field, which is located in the Blue ribbon. You can use any of the following information as your search term :
 - **Object name** : This refers to the main detail that describes the type of object. For example, for patients, this attribute is the patient's name. For services, it is the service description.
 - **Object number** : Every object has a special number. You can use this number to search for the object within the table. The name of this number changes based on the type of item. For instance, for customers, it is called the customer number. For suppliers, it is known as the supplier number.
 - Depending on the type of object, you can use more than just the object name and number to find it in the table. For example, you can use the medical aid number to search for patients. Similarly, the item code can be used to search for inventory items.

As you type any of the above listed search terms, the table section is updated by filtering out any objects that do not match the search parameter.

3. After sufficiently narrowing down the table, you can select or focus on a single object by:
 - Navigating the table using the up/down arrow keys on your keyboard.
 - Selecting a specific table row with a left mouse button click.

An object in focus is distinguished by a blue highlight in the table.

Updating/editing an object (Edit toolbar button).

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The toolbar of the OMP, which generally comprises three distinct levels, displays only one level at any given time. The following is an overview of these levels along with the functions they typically encompass :

- **Level 1 (Add, Refresh)** : This level of the toolbar is active when no specific object is selected or in focus. It features buttons for general actions that are not tied to a specific object. By default, when an OMP is opened, the toolbar is set to Level 1.
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Instructions :

- Open the Object Management Page (OMP). Generally, the OMP for most object types can be accessed from the menu in the homepage. However, the method of launching may differ based on the specific type of object.
- Find and select an object. Click [here](#) to find out how to do this.
- Once focused on a particular object, click the Edit toolbar button. After this step, the following actions will take place :
 - The toolbar transitions to **level 3**. This reveals the buttons that you will use to wrap up the creation or editing processes (i.e Save, Cancel).
 - The fields within the form section are activated. These fields/inputs are intended for specifying the various attributes of the object.
 - The table section is disabled, which means that no other object can be selected.

- The search input in the Blue ribbon is disabled.
- Proceed through the form inputs, filling out all required inputs and any additional ones you choose to complete. For efficient navigation, use the **Tab** key on your keyboard to move forward from one field to the next, or the **Shift + Tab** key combination to go back to the previous field.
- After entering the necessary information, click the Save toolbar button. If there are any required fields left blank, the system will not save the object. Instead, it will draw attention to and focus on the unfilled required field. However, if all inputs are properly filled, the saving process will be successful. After this step, the following actions will take place :
 - The toolbar will transition to **level 2**. This brings up the buttons that are useful after you've selected or focused on a specific object (i.e Edit, Delete).
 - The form fields become inactive.
 - The table section becomes active.
 - The search input in the Blue ribbon is enabled.

Deleting an object (Delete toolbar button).

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Instructions :

- Open the Object Management Page (OMP). Generally, the OMP for most object types can be accessed from the menu in the homepage. However, the method of launching may differ based on the specific type of object.
- Find and select an object. Click [here](#) to find out how to do this.
- Once focused on a particular object, click the Delete toolbar button.
- A dialogue will then appear on the OMP, requesting your confirmation if you truly wish to delete the object. To continue with the initiated action, select **Ok** in the dialog box. During the processing of the action, a loading animation, represented by a rotating circle, will be displayed on the screen. After this step, the following actions will take place :
 - The toolbar will transition to **level 1**. It features buttons for general actions that are not tied to a specific object (i.e Add, Refresh).

- The form fields are disabled and all entered data is cleared.
- The table section is enabled, and none of the rows are selected (i.e. focused or highlighted).
- The search input in the Blue ribbon is enabled.
- Once an object is deleted, you have the option to get in touch with technical support for its recovery, if needed.

Restoring a deleted object (Show toolbar button).

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Instructions :

- Open the Object Management Page (OMP). Generally, the OMP for most object types can be accessed from the menu in the homepage. However, the method of launching may differ based on the specific type of object.
- Find and select an object. Click [here](#) to find out how to do this.
- Once focused on a particular object, click the Show toolbar button.
- A dialogue will then appear on the OMP, requesting your confirmation if you truly wish to restore the object. To continue with the initiated action, select **Ok** in the dialog box. During the processing of the action, a loading animation, represented by a rotating circle, will be displayed on the screen. After this step, the following actions will take place :
 - The toolbar will transition to **level 1**. It features buttons for general actions that are not tied to a specific object (i.e Add, Refresh).
 - The form fields are disabled and all entered data is cleared.

- The table section is enabled, and none of the rows are selected (i.e. focused or highlighted).
- The search input in the Blue ribbon is enabled.