

General Screen Usage

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1 General Screen Usage

Most screens in the system typically contain several elements:

- Header, containing:
 - ◆ Menu.
 - ◆ Filter.
 - ◆ Button bar.
 - ◆ Home button.
 - ◆ Log Off button.
- Main results area.
- Detail panel.
- Footer.

Typically there are also several pop-up windows that are shown in certain circumstances.

You can go back to the home screen at any time using the  **Home** button on the header.

You can log out of the system using the  **Sign Out** button on the header.

The button bar on the header typically includes one or all of the following buttons:

-  **Query** - See [Queries](#) below.
-  **Refresh** - See [Results Tables](#) below.
-  **Settings** - This displays a pop-up Preferences window. Here, you can choose any roles that have been assigned to you (which can change the function of some screens and the menu options you are presented with).
-  **Export to Excel** - See [Results Tables](#) below.
-  **Export to CSV** - See [Results Tables](#) below.
-  **Add To Favorites** - See [Menu](#) below.
-  **Column Selector** - See [Results Tables](#) below.

The footer shows the version of the system - you can use this when reporting any problems.

1.1 Menu

The menu is accessible by clicking the  **Menu** button in the top left of the screen. This will display the menu. You can close the menu by clicking off the menu, or clicking the  **Close** button.

The menu shows all the screens that you as a user of the system have been configured to use.

The screens are categorised, so you can click on a category and see the screens (or sub-categories) that belong to that category. If you click again, the category will close.

You can search for a specific screen using the search box provided at the top of the screen.

You can open a screen in a new tab in your browser (if your browser supports tabs) by clicking the  **Call-out** button next to the screen.

If you have identified screens as a favourite by using the Favourite button in the header, the menu will list these screens under a Favourite category in the menu. You can remove them from your favourites by clicking the  **Close** button to the right of the screen name.

1.2 Queries

Most screens allow searching of the data by defining the criteria of the search - a query.

You can click the  **Query** button in the header to show the query pop-up.  **Note:** In some screens, this is a pop-out panel on the left of the screen.

 **Note:** If there isn't a lot of data to be displayed in the screen, all data may be displayed immediately without entering a query.

Depending on the screen, the filters will be displayed. In most cases, this is a list of all the data items you can find by. In some screens, you can choose the individual criteria one by one from a list.

When you have entered your query criteria, you can run the query using the **Submit** button.

You can clear the criteria entered by clicking the **Clear** button. This will display the Results Table, as seen below.

The pop-up can be closed with the **Close** button.

1.3 Results Tables

When queries are run (typically when the screen is first opened), the screen displays the results in a table. The screen will generally display the total records found in the footer.

You can sort the results table by clicking on a column header. If you click again, the sort will be reversed. You can sort on multiple columns by holding the control key when clicking - the screen will sort the data in the order that you click.

You can filter the data shown by entering into the filter columns provided by the screen. The screen provides a general filter on the header, and specific column filters under each column header. The filter is immediate - as you type, the results will be filtered. If you enter text in multiple columns, the screen will filter the data by all the entered filters.

You can change the order of columns by dragging the column header to a new position in the results table.

You can change the displayed columns in the results table using the  **Column Selector** button in the button bar. Here you can tick all columns you want to show in the results grid and also in the query filter. The screen provides buttons to **Select All**, **Deselect All**, **Reset Visible** and **Reset Filter**.

You can move from the first to last record (and vice versa) quickly using the  **First** and  **Last** buttons on the footer.

You can see the details of the record in the results table by clicking the row - typically, the screen will display the details in a pop-out panel from the right of the screen. See **Details Panel** below.

You can refresh the data shown in the results table by clicking the  **Refresh** button in the button bar in the header. The screen will re-run the query and re-display the results.

1.4 Details Panel

The screen will display the Details panel from the right of the screen whenever you select a record from the results table.

You can also choose to display the panel by dragging the panel open using the handle on the right of the screen.

You can close the Details panel by dragging it closed or clicking the  **Right** button on the top of the panel separator.

By default, the screen displays the Details panel as part of the main display window. When it displays, it reduces the amount of screen available for the results table, and the screen may display a scroll-bar in the results table so you can still see all data. You can change this by clicking the  **Pin** icon in the separator bar. This changes the detail panel so that it floats over the results table - in this mode, you will need to hide the panel to see the full results table.

The options available on the details panel typically differ from screen to screen - see your specific screen documentation for details. However, you will normally find some or all of the following:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.



-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

Typically, the details panel displays a lot of data organised into sections - by default, all sections are displayed and you can scroll up or down to see all the details. You can collapse or show these sections by clicking in the header. You can collapse or show all sections by clicking the  **Toggle** button on the detail panel tool bar.

You can scroll up and down the Details panel to see all the data. Moving down the list of results will also display a floating  **Back to Top** button in the bottom right of the panel.

When the screen supports it, you can use this panel to enter new records or amend existing records.

Each field displays with an icon before it. When the screen requires that this is entered, this will be coloured red.

You can clear entered data or reset data to its original form.

You can save changes if allowed by using the  **Save** button.  **Note:** When you save changes, generally any filters you have applied to the results table will be undone.

1.5 Notifications

Whenever you take actions in a screen, you will be notified of the success or failure of your actions through a notification message. These appear at the top of the screen.

Informational messages are coloured green and will disappear after a few seconds.

Error messages are red and will stay on the screen until you clear them.

Regardless of the type of pop-up message, you can clear them from the screen by clicking the  **Close** button on the right-hand side of the message.

1.6 Mobile Devices

 **Note:** This system is not intended to be used on phones - this is desktop system.

However, the system may be used on 8inch tablets or above through the browser (Chrome tested on Android).

There are some limitations:

- The device will at times display a popup keyboard. This can be hidden by using the Back button on the device. Further, the screen above will scroll to allow you to see what is being entered, and you can move this by dragging above the keyboard. A Bluetooth keyboard can be attached to mitigate this.
- The application will not function properly in Portrait mode on mobile device. Turn orientation changes on the device off and lock to landscape mode to mitigate this and prevent the device switching orientations automatically. Note that the screens affected will inform you that the application should be run in Landscape mode and you will not be able to use the screen until you switch back.
- All popups will display using the maximum amount of space available in the browser. For some very large popups, you may be required to scroll to view buttons. Specifically, the New Tyre popup in Call Logging requires you to scroll to access the buttons - simply drag the screen to access them.
- Hover-over functionality is not supported on tablets, so popup help associated to fields and buttons is not accessible. Further, in any reports that support it, the export options to tables cannot be accessed on a mobile device.

