User Interface Basics

1.004

Lesson Details

	Learning Objectives:	To ensure that trainees have a general understanding of the basic user interface elements of the platform as a foundation for later training modules.
	Duration:	50 minutes
	Pre-requisites:	1.002 Accessing the Application
	Recommended:	[None]

Agenda

Work Item Level User Interface (Toolbar)

Work Item Level User Interface (Document)

Q&A

Agenda

Work Item Level User Interface (Toolbar)

Work Item Level User Interface (Document)

Q&A

Work Item Toolbar: New Document

Validate   Save   Save & Close   Submit

Icon	Comment
Validate	The Validate button performs the validation of the work item and displays the validation messages on the Validation tab
Save	The work item is saved to the database and remains open for the user to continue working
Save and Close	The work item is saved to the database and then closed
Submit	Triggers submission of the work item through the workflow

Work Item Info: Read-only Document

Icon	Comment
Info	Displays a table showing the how the work item has moved through the workflow
Timeline	Provides a graphical overview of the document's movement through the workflow over time. The document is opened in edit mode
Claim	Opens the work item for update, claimed by the current user
Cancel	The work item is closed, and the user returned to the Work Tray

Work Item Info

Displays the movement of the document over time, including any submission comments that were entered.

When you click the Info button, a popup window documents the movement of the work item over time, including any submission comments that were entered.

Click the clock icon to toggle between absolute time (e.g., 22 June 2020, 9:21:05 am) or relative time (e.g., 13 minutes ago).

The display shows the movement of the document over time, and the Workflow step at each submission, This work item has moved through several steps and is currently at the step with the orange bullet. Each previous step has a red bullet.

You can drag the Timeline horizontally to move it and also zoom in or out.

When you click the name of a previous step, you are shown the changes made to data grids on the work item. New rows are colored green, deleted rows are colored grey, and modified rows are colored red.

The grid displays the value at the current step,, but when you hover the cursor over a cell a popup will display the value as it was at the selected step.

Work Item Toolbar: Claimed Document

Icon	Comment
Validate	The Validate button performs the validation of the work item and displays the validation messages on the Validation tab
Reload	Reloads the work item from the database, overwriting any changes
Print	Enables printing of the work item without menus or toolbars, using the browser's print functionality
Submit	Triggers submission of the work item through the workflow
Cancel	The work item is closed, and the user returned to the Work TAll changes are discarded, the work item is closed, and the user returned to the Work Trayray

Agenda

Work Item Level User
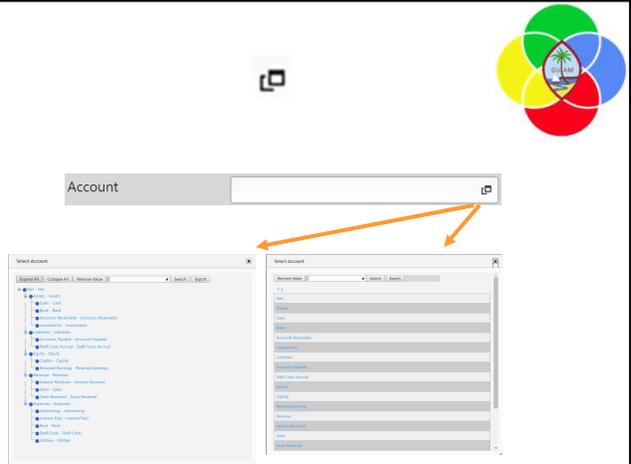Interface (Toolbar)

**Work Item Level User
Interface (Document)**

Q&A

A Popup has two presentation options:
- An expandable TreeView, with search functionality
- A flat list in which the Lookup Data Items are presented in the order defined in BIDS Studio. This option also has search functionality.

To search the Data Items, enter a text string into the Search box and click the **Search** button.

Multiple items are displayed on the popup which is modal, that is, it blocks access to the form until it has been closed. It is also resizable and movable.

No items are selected by default.

Lookups: Predictive Typing

Fields that accept input from a popup style lookup also allow predictive typing. When you start typing into the field, a dropdown list is displayed of list items that contain the characters typed.

| Estimate Status* | acce |
| Policy/Parameter* | Accepted |

Fields that accept input from a popup style lookup also allow predictive typing. When you start typing into the field, a dropdown list is displayed of list items that contain the characters typed.
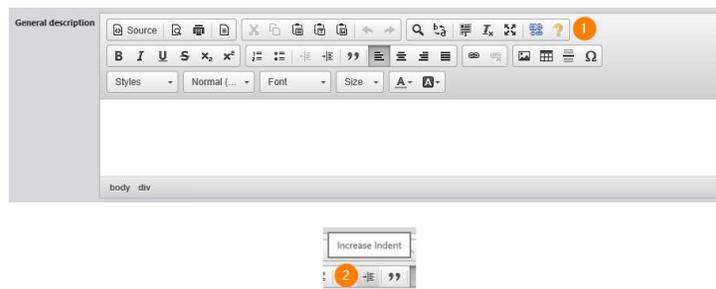
For example, if you type 'acce' in the field the list filters to items that contain those letters.

You can often enter values more quickly when using predictive typing than by opening and then selecting from the popup list.

Narratives or descriptions may be typed into rich-text fields that allow the user to format the input; for example, **bolding** or *italicizing* the text.

1. Click the Help button for a detailed listing of all the Editor features;
2. Hover your cursor over a button to display a tooltip.

The Data Grid is used for entering quantitative information in a tabular layout.

The Grid is used for:
1.   Entering transaction data pertaining to an Adjustment;
2.   Various Administration screens.

Values can be entered into cells either by selecting from a lookup or directly typing a value.

The Data Grid has controls that allow the users to:
1.   Filter rows on the grid/Maximize/Hide the grid
2.   Perform actions on grid rows
3.   Page through grid rows.

The Data Grid is highly configurable, so the columns on the grid are specific to the work item's purpose.

See the Using the Data Grid training module for more detail on this topic.

Agenda

Work Item Level User Interface (Toolbar)

Work Item Level User Interface (Document)

Q&A

Thank you for undertaking the lesson:
User Interface Basics

Please complete the survey: