



ProjectVIEW^{ERP}

Cost Monitoring Solution

User Interface

This section describes the common functionality of the interface the user will encounter during the interaction with ProjectVIEW.

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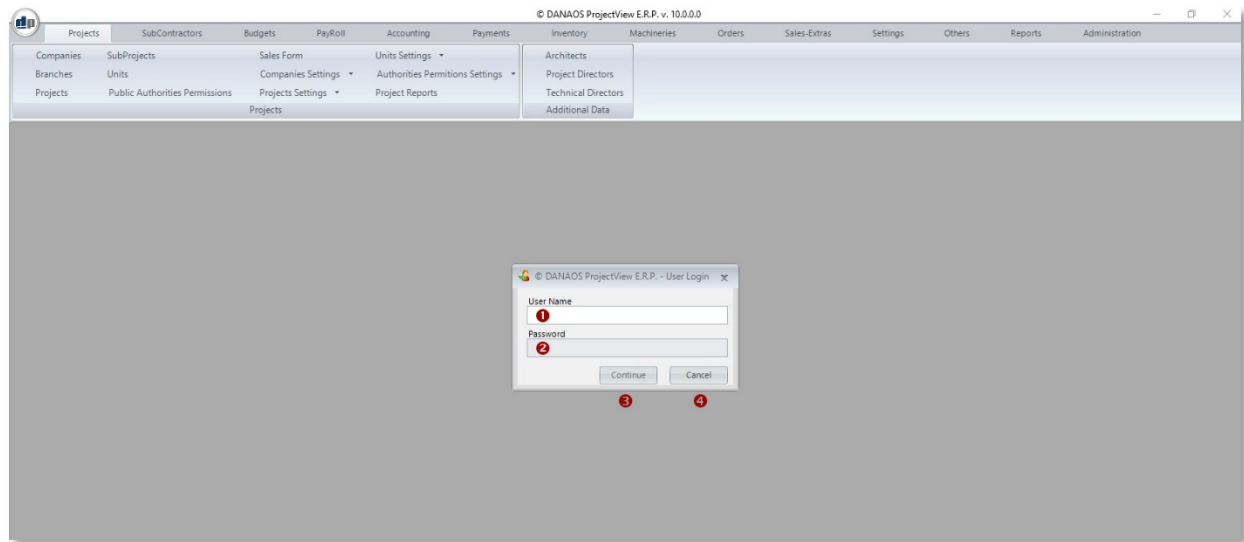
1 Introduction

ProjectVIEW is an ERP software which is designed to retrieve, present, edit and save different types of data to the user. It therefore uses a variety of devices such as forms, lists and buttons throughout its environment to accomplish this task.

This section lists all these devices and describes their functionality. It is intended as a supplementary manual to all other manuals provided alongside ProjectVIEW.

It also describes the first screens the user is presented with on loading the software.

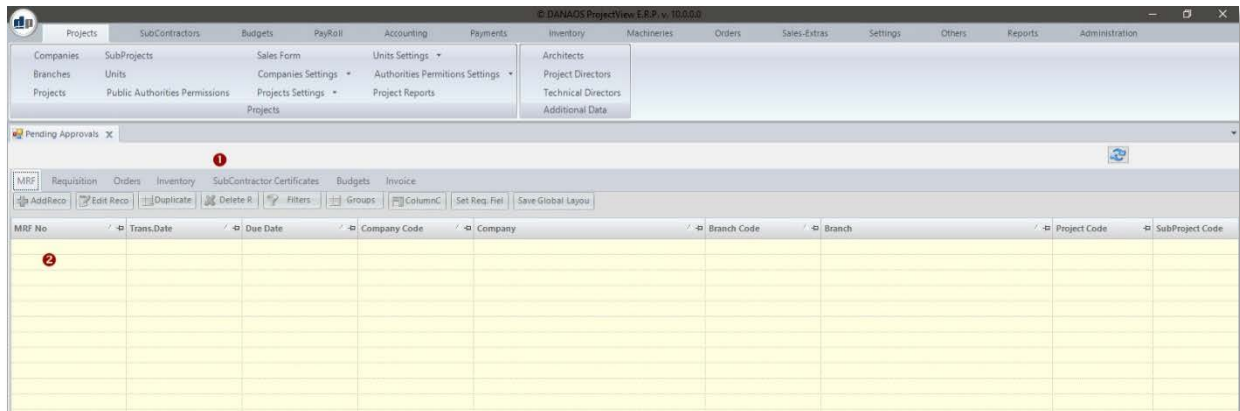
2 Login Screen



The first screen the user encounters upon loading ProjectVIEW is the login screen. In order to continue using the software the user has to enter a valid user name in field 1, a password in field 2 and click on the “Ok” button (3).

To exit the program, simply click on the “Cancel” button (4).

3 Pending Approvals Screen



After logging in, the system displays the “*Pending Approvals*” screen.

In various stages of the process within ProjectVIEW a system of approvals is set-up. This ensures that crucial operations are not performed without the authorization of the appropriate user. When a user has a number of requests pending for approval, these requests are listed in the aforementioned screen.

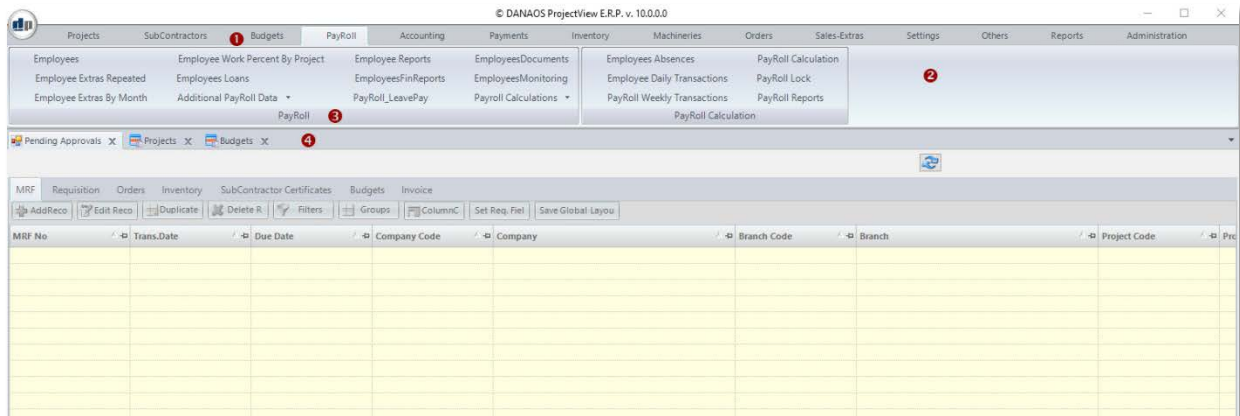
The requests for approvals may belong to various categories, depending on the module and section from which they were issued.

To view and approve/reject a request, the user has to select the appropriate category (1) and double-click the request.

Note

More information on approvals can be found in “*00 03 Approvals*” manual.

6 Main Ribbon and Tabs



Navigation between different parts and modules of the application is performed using:

1. The application menu. It lists all the available ProjectVIEW modules. Clicking on a module changes the visible ribbon contents.
2. The module ribbon. Displays all the menu groups relevant to the selected module. It can be minimized by right-clicking on any part of the ribbon and selecting *"Minimize the Ribbon"*. To maximize it, the user can right-click on the application menu and uncheck the *"Minimize the Ribbon"* option.
3. The menu groups. Contains all the buttons and drop-down menus for the selected module.
4. The open tabs. All open forms, screens etc are displayed as tabs. The user can close any tab by clicking on the "x" on that tab. Please note that if there are any unsaved changes within that tab, a confirmation message will appear. The user can also right-click on any tab to select the *"New Horizontal Tab Group"* or the *"New Vertical Tab Group"* to split the screen in order for more than one form to be visible.

7 Views in ProjectVIEW

Forms within ProjectVIEW may be presented in four possible layouts:

- ✓ Single Form View
- ✓ Master – Detail View
- ✓ Grid view with retrieval arguments
- ✓ Full grid view

7.1 Single Form View

A single form displays data relevant to a specific entity i.e. a supplier, an item, a company branch.

A single form view usually comprises of:

1. The form buttons (1)
2. Tabs with different content (2)
3. The form content (buttons, text fields, drop-down fields etc) (3)

7.2 Master – Detail View

The screenshot displays the 'Master - Detail View' for a Requisition in ProjectVIEW ERP. The interface is split into two main areas:

- Master Form (Top):** This section contains various data entry fields and tabs. It includes a toolbar with buttons like 'Save Data', 'Close For New Eval.', 'Create Excel Document', 'Create Quotations', 'Print Quotations', 'Print Evaluation', 'Update From Evaluation', 'Update From Sup Ans', 'Create Order', 'Create PreOrder', 'Import Excel Quot.', 'Send Quotations', 'Upload Requisition', 'Inform Suppliers', 'Download Quotations', and 'Update Budget'. Below the toolbar are several tabs: 'Basic Data', 'More Data', 'Approvals', 'Related Documents', 'Select Suppliers', 'Connected Documents', 'Evaluation', 'Hidden Fields', and 'Requisition Eval Criteria'. The 'Basic Data' tab is active, showing fields for 'T Date', 'Company Code', 'Branch Code', 'Project Code', 'Sub Project Code', 'Unit Code', 'Requisition No', 'Due Date', 'Supplier Code', 'Customer Code', 'BudgetCode', and 'Units Extras Extra Cnt No'. Other tabs like 'More Data' and 'Approvals' also show various fields and values.
- Detail Form (Bottom):** This section is a grid used for entering associated entries (BOQ lines). The grid header includes columns for 'Hist', 'Pr. L', 'Line Num User', 'Item Code', 'Item Description', 'Item Analytical Description', 'Item Unit Code', and 'Item Unit Description'. The grid itself is currently empty, with a 'Grid Add Prompt' in the first row. A toolbar on the left side of the grid contains buttons for 'Add', 'Delete', 'Print', 'Refresh', 'Filter', 'Sort', 'Zoom', 'Print', 'Close', and 'Clear'.

This view presents a specific entity, i.e. a Requisition and all the associated entries to that entity (i.e. BOQ lines).

A Master – Detail view comprises of two parts:

- ✓ The Master form. This can have:
 1. The Master form buttons (1)
 2. Tabs with different content (2)
 3. The Master form content (buttons, text fields, drop-down fields etc) (3)
- ✓ The Detail form. This can have:
 1. The Detail form buttons (4)
 2. The Detail form content (usually a grid) (5)

7.3 Grid view with retrieval parameters

This view allows the user to set a number of parameters in order to retrieve data and present display them in a grid format.

A Grid view with retrieval arguments comprises of two parts:

- ✓ The Parameter form. This can have:
 1. The form buttons (1)
 2. The form content (buttons, text fields, drop-down fields etc) which allow the user to set their arguments (2)
- ✓ The Grid form. This includes have:
 1. The grid buttons (3)
 2. The list of entries (4)

7.4 Tree Grid view with retrieval parameters

This view displays a list of entries in a grid just like the previous one. It usually comprises of:

The screenshot shows the ProjectVIEW ERP interface. At the top, there is a navigation bar with various modules. Below it is a search and filter area with fields for Company Code, Branch Code, Project Code, SubProject Code, and Budget. The main area displays a grid of items with columns for Item Code, Item Description, Qty, Transfer Qty, Approved Qty, Item Unit Code, Item Unit Description, Internal Order Qty Pending, and SR Qty Pending. Some rows are expanded to show detailed analysis, while others are collapsed to show a summary.

UserSelectionGroupCode	ItemCode	ItemDescription	Qty	TransferQty	ApprovedQty	ItemUnitCode	ItemUnitDescription	InternalOrderQtyPending	SRQtyPending
	01141		30	0	0	Nss		0	0
	031100005	Plywood for forms, 2 x Use	2	0	0	m2		0	0
	031100005	Plywood for forms, 2 x Use	2	0	0	m2		0	0
	0315113	Waterstops	0	0	0	lm		0	0
	0321100	Reinforcement Bars	0	0	0	kg		0	0
	0321100	Reinforcement Bars	0	0	0			0	0
	0321100	Reinforcement Bars	0	0	0			0	0
	032300001	Galvanized Tie Wire 22 Gaug.	2	0	0	kg		0	0
	032300001	Galvanized Tie Wire 22 Gaug.	2	0	0			0	0
	031100005	Stationary Pumps & Extensio...	0	0	0	m3		0	0
	031100005	Stationary Pumps & Extensio...	0	0	0			0	0
	031100005	Stationary Pumps & Extensio...	0	0	0			0	0
	03310001	Readymix Concrete Type-V, 20	0	0	0			0	0
	03310001	Readymix Concrete Type-V, 1...	0	0	0	m3	m3	0	0
	033900	Concrete Curing	0	0	0	m2	m2	0	0
	044216	Steel Stud-Supported Stone...	0	0	0			0	0

The difference is that the grid consists of lines which can contain an internal analysis. These lines can be:

- ✓ expanded to show their full analysis by using the “+” sign at the beginning of the line
- ✓ or collapsed to show the summary by using the “-” sign at the beginning of the line

7.5.1 Layout Settings

Every grid has a multitude of columns that can be displayed. The user can select to hide, show or reorder the available columns.














Therefore, in most grids, the following buttons are available to facilitate the column management:







Create Custom Layouts	Save the current column configuration. This can be later reloaded.
Load Custom Layouts	Load a different column configuration.
Fetch from Default User	Load the default column configuration

By using the above buttons, a user can swiftly switch between different column configurations to better perform a job

8 Common Buttons

The following buttons can be found throughout the program:

	Move	Moves to the previous/next record
	Move	Moves to the first/last record
	Add Record	Performs the addition of a new record
	Duplicate Record	Inserts a new record which is the complete duplicate of the one selected
	Edit Record	Edits a record. Same as double-clicking on a record
	Delete Record	Deletes a record. The system will ask for confirmation before the final deletion
	Refresh Data	Refreshes the data in the current screen
	Print	Prints the selected records
	Save	Saves the data on screen in the system
	Filter	Displays a line with filters on top of the grid. The user can type a text in each column which will filter that specific column by the text entered. This is similar in functionality with the filters found in any datasheet management software
	Works Menu	Displays a menu enabling the user to export data
	Export to Excel	Exports the selected data to an excel file
	Export to PDF	Exports the selected data to a pdf file

	Vertical split	Inserts / removes a vertical split in the screen
	Horizontal split	Inserts / removes a horizontal split in the screen
	Column Chooser	Displays a list of all the columns available for display in the grid. The User can select or de-select any number of columns to customize his/her experience
	Retrieve	Retrieves a list of records
	Browse	Browses the database for a record
	Remove selection	Removes a selection from a text box

Note

When the filters are displayed, the User can also select the filtering options (Contains, Starts with, Equals etc) by pressing on the symbol next to the column filter.



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