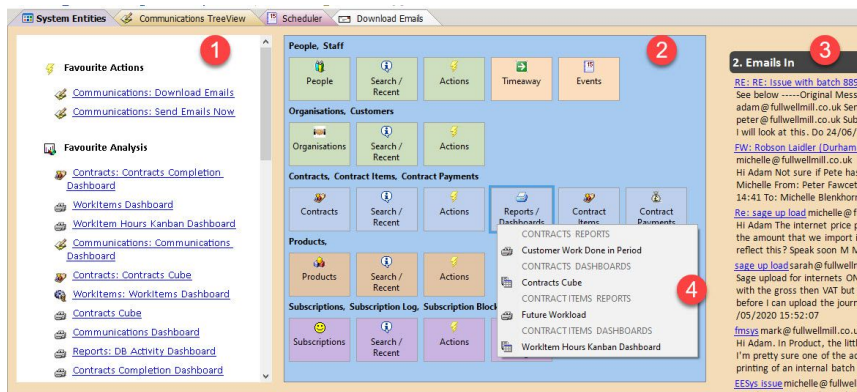


The System Entities Screen

Main features of the System Entities Screen



System Entities Main Screen

1. Favourites Dataviewer. This area of the screen is empty when the user first uses the system. It gradually fills up with items related to their activity using the system. For most users their work will end up being listed in this part of the screen. By clicking on the items in this list they can reach the parts of the system they use most frequently.
2. The "Master Entities" section. The most important Entities in a system are shown here. Entities are sets of data-tables in the database which have been linked together so they can be used to manage a business or organisation.
3. A custom-dataviewer: In this case showing automated emails sent by the Orixia server.
4. Clicking on each icon in the System Entities screen will open a list of options, as shown here. These options relate to work users can undertake using the system.

The System Entities screen is the first page that opens into your system. This is the entry point for the system, and can be crowded with a lot of icons.

Most users within any business only have responsibility for certain areas. For example in a factory some staff might be mainly responsible for "Production" while others might be responsible for "Sales". In this situation there will probably be a "Production" and "Sales" Entity visible in the System, and these staff would only need to access the parts of the system they can reach from their Entities.

Remember to right-click with your mouse

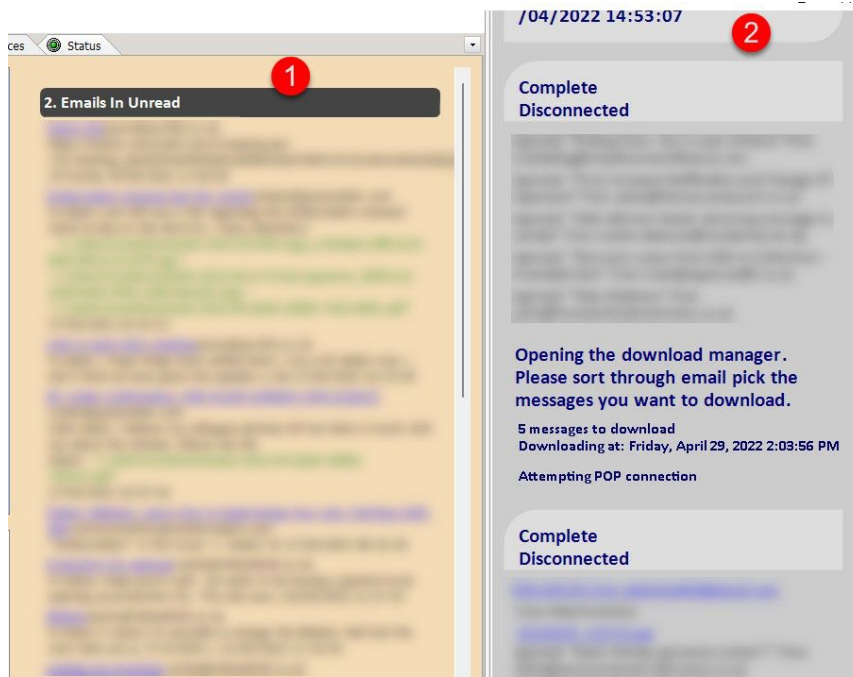
Through out Orixia most objects on the screen have some "intelligence", if you right click with the mouse a list of choices called a **context menu** will open that relate to the particular item. This is a standard for the system, and helps to reduce the number of buttons, links and other pieces of "furniture" on-screen.

As you start to use the system please try to right-click on as many objects as you want, to see the context menus which appear. Efforts have been made to ensure that right-clicking on an object opens a list with relevant choices, even choices as simple as "close this now".

Note that the main screen also features a useful **main menu** details of its operation are covered in the following topic:

[The System Main Menu](#)

Additional Elements of the System Entities Dashboard



System Entities Main Screen Message Log

Some, but not all System Entities Dashboards feature extra elements as shown above

1. "Data viewers" these are visual components which can be used to display and access data together with summary information about it.
2. The System Message Log. This opens whenever the system undertakes a complex task, and want to give you updates and messages about what it is doing. Error messages are also displayed here.

How to use the System Entities Dashboard

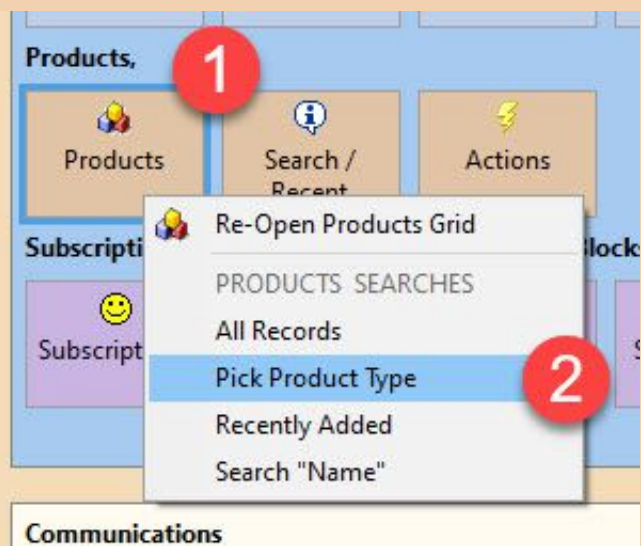
Entities: Your general purpose point of entry into the system



An Entity in a system, holding access to the "Contracts", "ContractItems" and "ContractPayments" BusinessObjects

1. The names of the linked BusinessObjects are detailed at the top. Clicking on this text moved the Entity to the top of the screen and opens a "search box" allowing quick searches, detailed below.
2. The Contracts BusinessObject Icon. Click here to see a list of Grid-views you can access for this BusinessObject, click here to see a list of options, how these work is detailed below.
3. Search / Recent. If you wish to find an individual "Contracts" record, click here to see recently opened records you might want to re-open, or to open a search-list, details of which are laid out below.
4. Actions. Not all Entities will have this button. Click here to see the actions that can be done to this Entity. This is the starting point for accessing tasks or work you can do in the system.
5. Reports / Dashboards. Not all Entities will have this button. Click here to see a list of options to show data linked to this entity.
6. The ContractItems and ContractPayments icons. Both these BusinessObjects are "children" of the Contracts BusinessObject, so they are shown in this Entity group. Clicking on either icon opens a list of view-grid options similar to the one described in 2., above.

Accessing view-grids, edit forms, actions and dashboards from the Entity



BusinessObject View-Grid Button

The Main BusinessObject Icon

Clicking on the icon for a particular BusinessObject opens a menu listing options to view grids of data for this BusinessObject and any related "extension" objects.

Clicking on an item in the list will open a grid of records in the database.

Details of the view grid, and how to work with it are covered here:

[View Grids for viewing, sorting and finding large numbers of records](#)

The "Search / Recent" Button

1. Click here to open access to allow searching for individual records of any BusinessObject linked together in the current Entity.

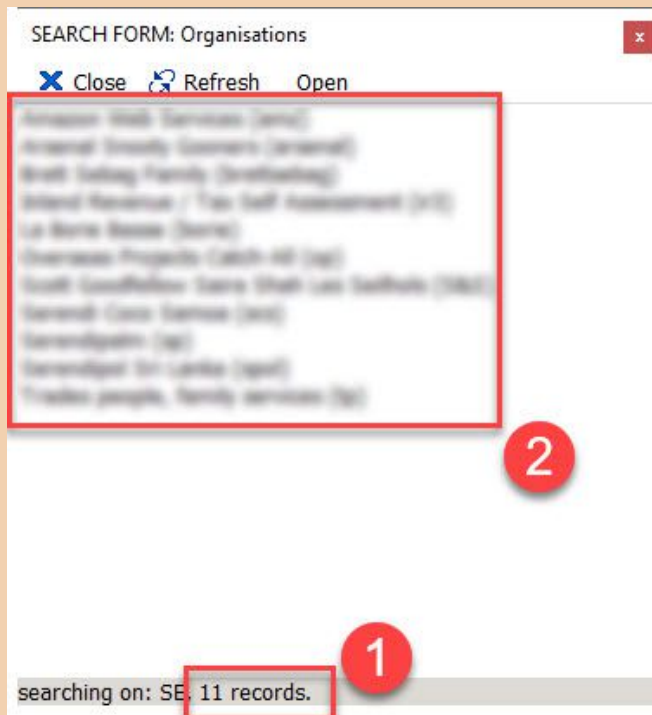


BusinessObject Search Button

- Below the search options "RECENT RECORDS" are shown, with the past 20 records you have viewed for this BusinessObject. Note that records opened **anywhere** in the system are always added to "recent lists", and there are several places you can access this list for a BusinessObject.

If you click on the "Record Search" a window will open listing **all** the records in the system for the selected BusinessObject. you can type in this list to search for the text you have typed. Once you find the record you are looking for, double-click on it to open it.

Note that for more complex BusinessObjects with multiple data-tables. This button will show options for searching "Extension" and "Child" data linked to any BusinessObject.



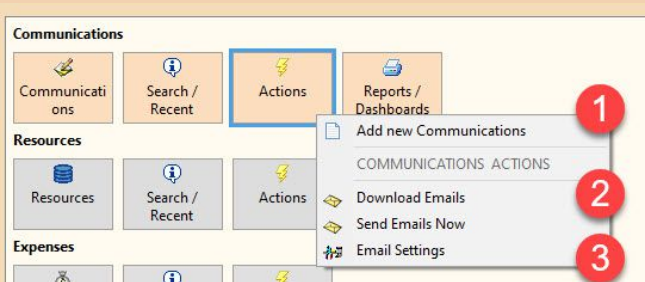
BusinessObject Record Search Form

A "Record Search" window with search text entered

- The user has typed "SE", this has filtered the list of all Organisations to find only those whose name includes the text "SE". Note that the search text can occur anywhere in the name.
- Clicking on any of the list will open this Organisation's Edit Form.

Note that typing "Esc" at any time deletes the search, returning the list to its full number of items. Also, pressing "Delete" at any time deletes the final character from the current search text.

At any time the user can double-click on a record to open the Edit Form for this data-record.



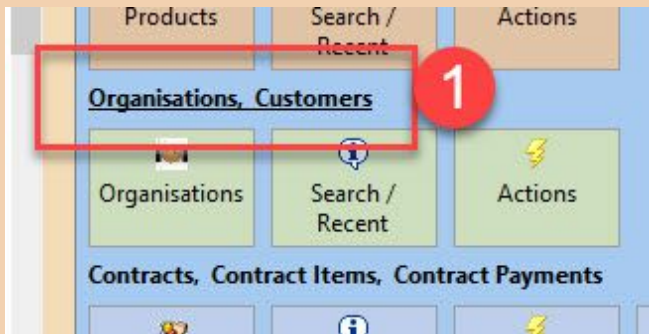
BusinessObject Actions Button

The "Actions" button

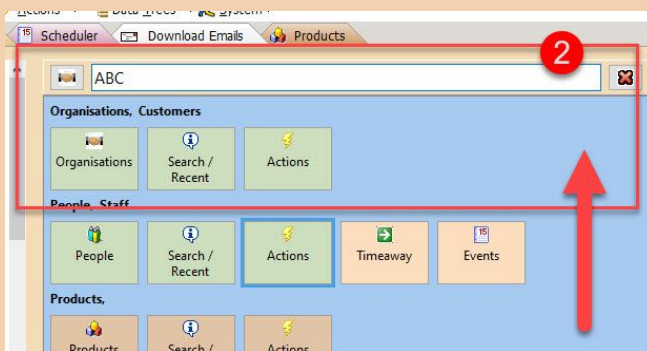
The actions button is more dynamic than other parts of the Entities screen, and depending on the particular Entity very different items may be shown.

- Most BusinessObjects include an option to "Add new ..." from the actions button. Click here to add a new record for the selected BusinessObject to the database.
- Some BusinessObjects will include dedicated actions that can be accessed from this list. These will trigger special work by the system.
- A few BusinessObjects include custom-code

3. written with special functionality that are accessed from this list.



BusinessObject Quick Search 1



BusinessObject Quick Search 2

The System Entities Quick Search

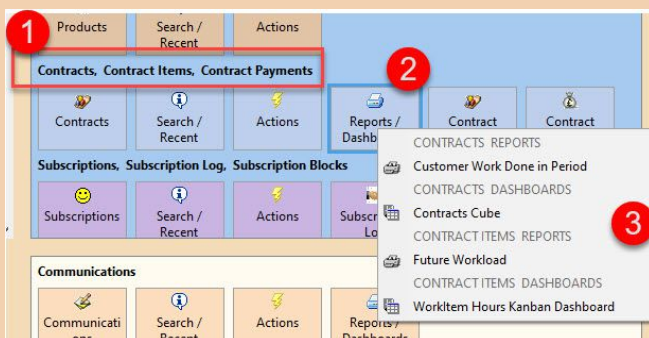
1. Click on the Title of the entity you wish to search. This "gives focus" to this entity, moving it to the top of the window and opens the quick-search field.
2. The entity will move to the top of the screen (as shown by the arrow) and a search box will open. You can type anything into this search box, and the system will do its best to find data based on your entry.

You can type in the ID or FID (Batch Number) of the record you are looking for, if you know it, followed by "ENTER" / "RETURN".

You can also type in a name or date (if the data is date-based)

You know which Entity is being searched because it is pulled to the top of the screen, and its icon is shown in the left side of the search box.

The system will try to a record based on what you have entered. If it finds more than one record with this initial search then a list will open with all the records matching this search.



BusinessObject Reports Dashboards 01

The "Reports / Dashboards" button

Many, but not all Entities will include this button. It serves a similar function to the "Actions" button. It shows a list of work that can be done related to the selected Entity. It is different from the Actions button because it shows a list of ways of outputting and viewing data, whereas the Actions button is used to trigger processing and work by the system.

1. Items in the list which produce "paper-like" reports and PDFs will be marked with a "printer" icon.
2. Items in the list which produce dashboards with charts/grids and data-cubes will be marked with this icon.

More detail on viewing and using Dashboards is shown here

[Data Dashboards: Viewing data visually](#)