The Resources Treeview: Accessing Resources and Reports

If the user clicks on the "Resources", "Show Resources Tree" options in the main application menu, a Window opens, as shown in the images below. This is the main point of access for viewing all the "Resources" in your App. These hold links to visualizations and reports that can display data such as management reports, charts of business activities etc. It is called a "Tree view" because the main list of reports is organised with headings as branches with sub-headings below in a tree-like structure.

The Resources Treeview shows data-records from the Resources system-table, Developers of your system can add reports, charts and other visualizations of your data by adding to this system-table, and these then allow users to view system data in useful visual formats.

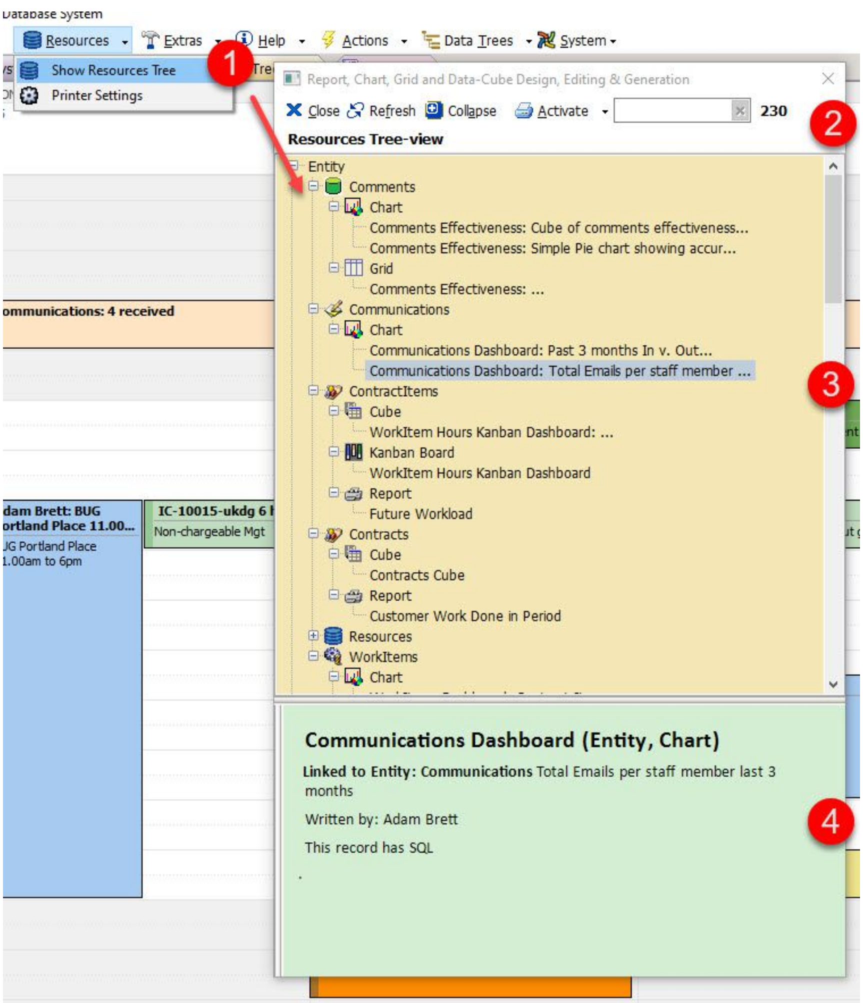
It is also possible to run reports and resources from the "System" "Show / Edit System Resources" screen, as shown at the end of this document.

The Resources Treeview, all Resources created within the system can be accessed here.

You App contains Resources to produce Data-grids, Reports, Charts, Data-Cubes, Kanban-boards, Treeviews and other User-interface elements.

The Resources Treeview displays all of these, and allows all of them to be **executed** showing whichever User-interface your Developer has created.

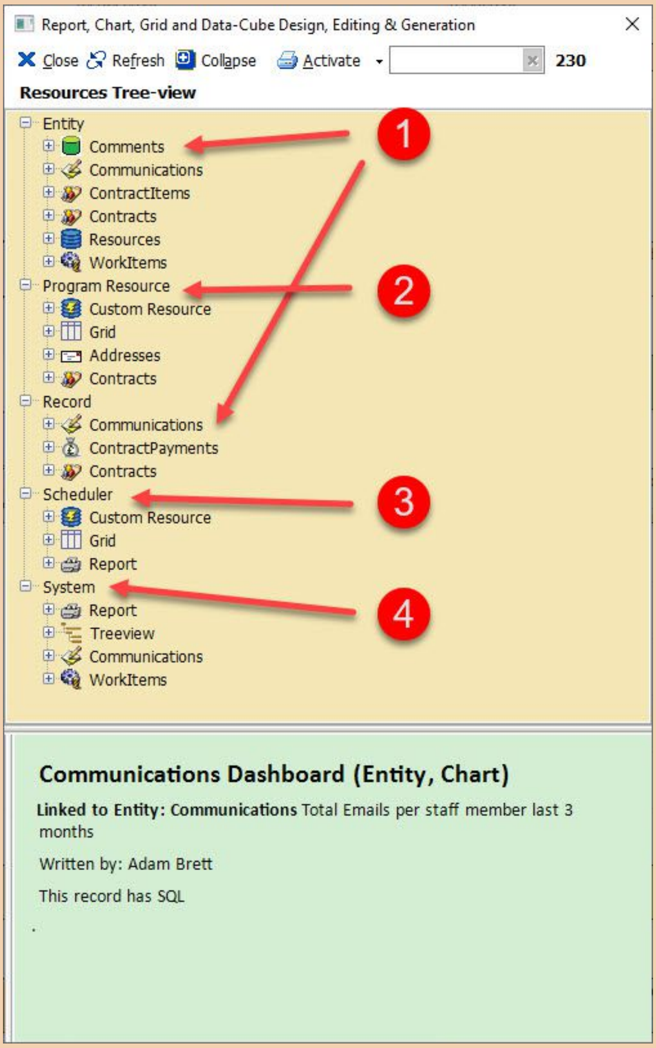
Users with high enough Security Levels can also access the records in the Resources data-table directly from the Resources Treeview, allowing them to edit and update the Resources, extending or changing them.



Accessing the Resources Treeview

1. Access the Resources Treeview from the "Resources" main menu.
2. The Treeview has a **toolbar**, with buttons and search/filter box where users can add text to search for

2. items in the tree.
3. The Treeview lists of all the Reports, Charts, Dashboards etc., in the system. The items are grouped by their linkages to BusinessObjects. If users do not want to look through the items in the tree, they can search for a resource by typing its name in the search-field.
4. The Treeview includes a Description panel. If any description or image file is added to the Resources data-table, it will be shown here to give users an idea of what the report, chart or dashboard looks like,and what it shows.



Resources Treeview Headings

Main Resources Treeview Window

Administrator-level users can edit, add and delete records in the Resources system-table.

General Users can search for and show items in the treeview to see the data they generate.

Items are grouped by headings:

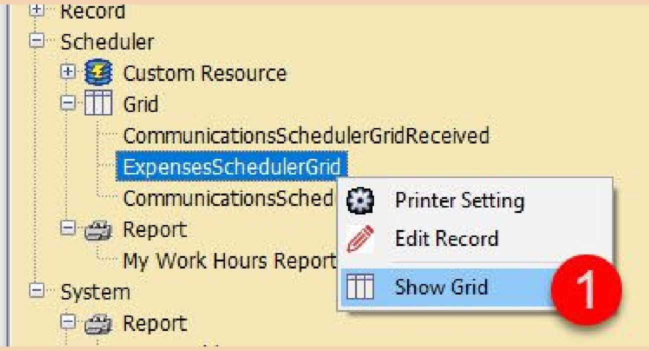
1. Business-Object-Linked Resources, will show linked to either the "Entity" or "Record".
2. Developers of Orixa systems can add Program Resources to the Resources system-table, to add complex functionality to an App. The exact functioning of these resources is beyond the scope of this help document, but is covered in the Developer sections.
3. Scheduler-Linked Resources. These add functionality to the Dairy/Scheduler.
4. System Heading. This is the heading for "left over" resources, which are not directly linked into the application. In general these resources are run directly from the Resources Treeview.

Context Menu: Report

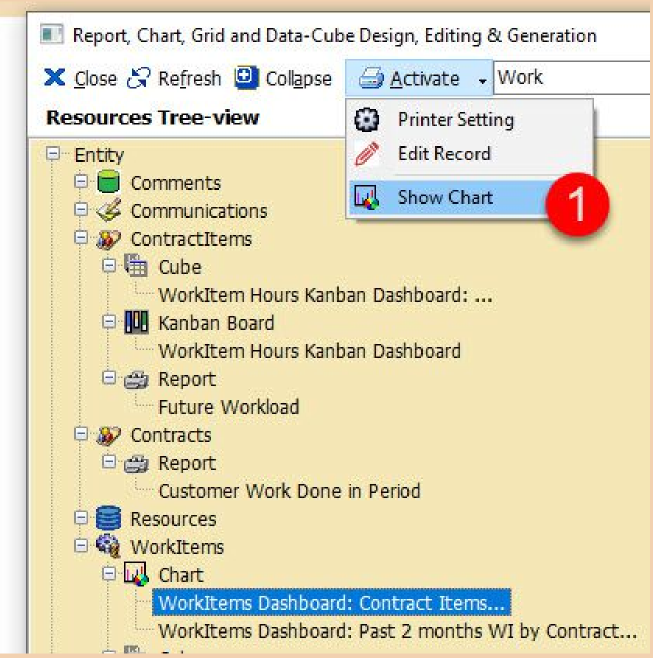
Context Menu

In keeping with the rest of the System, the treeview has a context menu, which allows you to initiate actions on whichever record is selected in the tree view.

1. Click "Show Report" (or Show Grid / Chart /Cube for a Chart/Cube etc., as per the selected Resource) to actually run it.



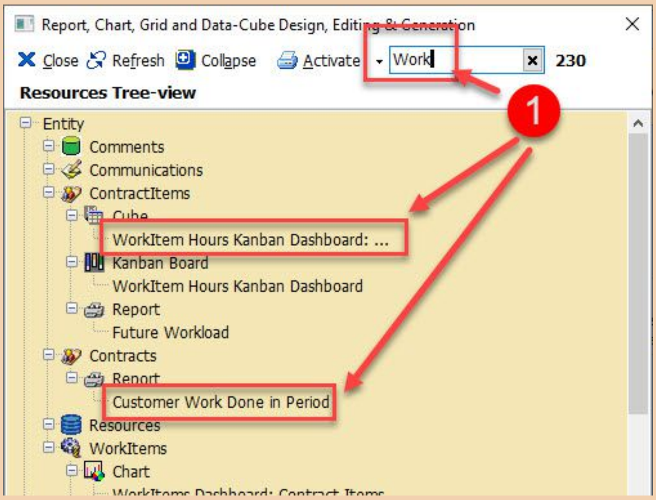
Context Menu: Grid



Resources Treeview Activate Menu

Activate Menu

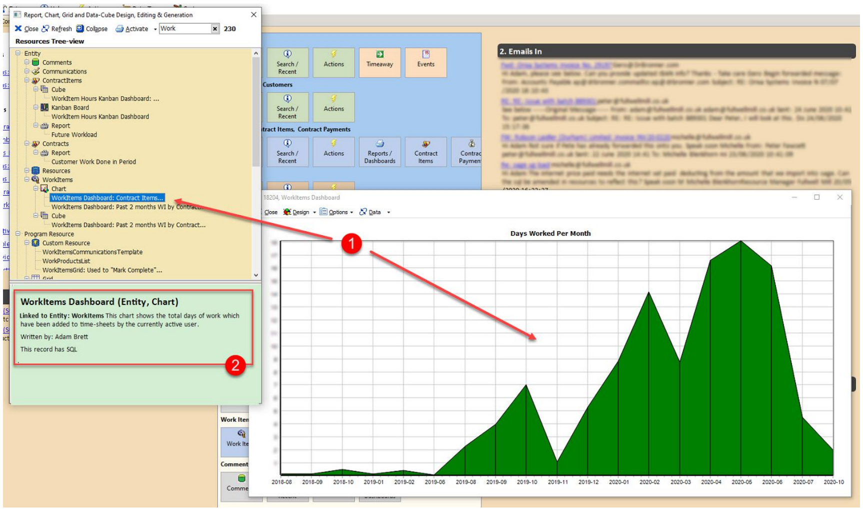
The "Activate" button in the tree view's main menu opens the context menu for the tree view, with the same choices as if the user right-clicks on the tree view.



Resources Treeview Search Filter

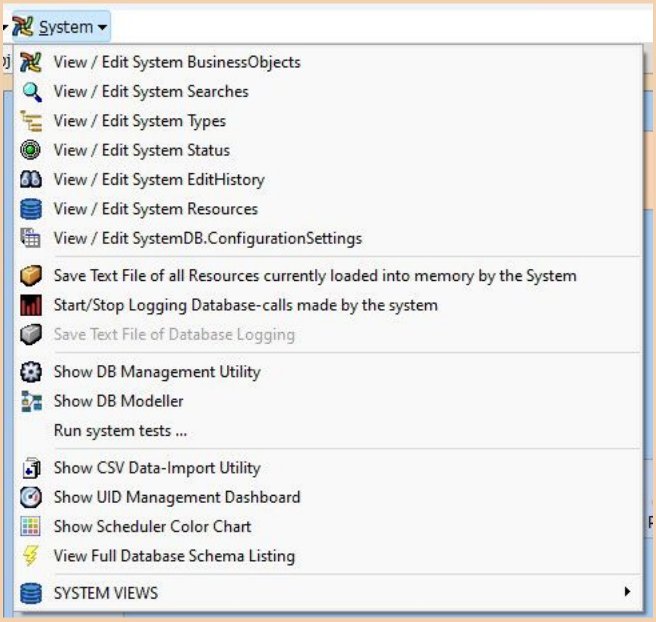
Filter/Search the tree view

1. Type any text into the filter/search box and only those reports with titles that match the search text will be displayed.



A typical chart report being run from the resources tree-view.
Note (1) that for this particular report an image has been added to the reports data-table to show a preview,
and note (2) that a simple description has been added to this resource to explain what it does to the user.

Show / Edit System Resources

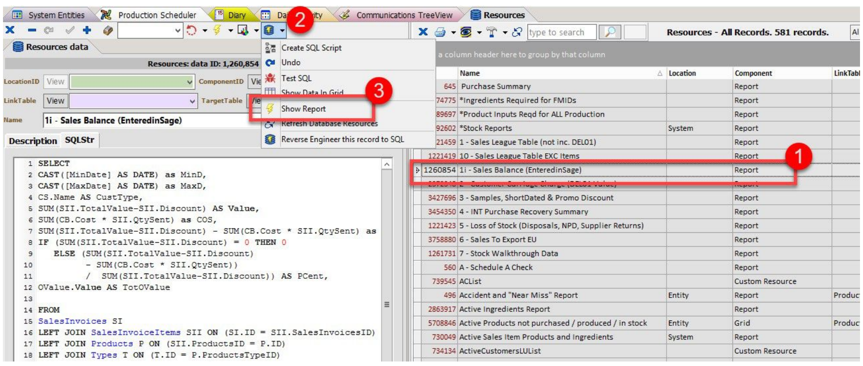


System Entities System Menu

Accessing All System Resources

Click on the "System" menu, as shown in the image on the left. Part way down the list, click on "View / Edit System Resources", and a grid-view of all Resources will open.

NOTE: The System Menu is only visible for users with a high Security Level. If you cannot see the System menu please ask a user with a higher Security Level to access it for you.



Running Report from View / Edit Resources grid-view

Once the View / Edit Resources grid view is visible, undertake the following steps:

1. Find the row in the grid which contains the report you wish to run. Double click to open the record.
2. Click on the "Execute" button.
3. Click on "Show Report"

Note that some reports work with a context, such as listing sales for the currently open customer. In these cases the exact report which is output will depend on the exact state / context of your Orixa App at the moment the report is executed.