Worksurfaces: Panels that show interlinked data in an intuitive way

What are Worksurfaces?

Worksurfaces are User Interface elements in your App which show badges, or areas which are linked to data in the database.

Why are Worksurfaces useful?

They provide an intuitive way of displaying data with colour-coding and intuitive grouping, users will rapidly aclimatize themselves to using them.
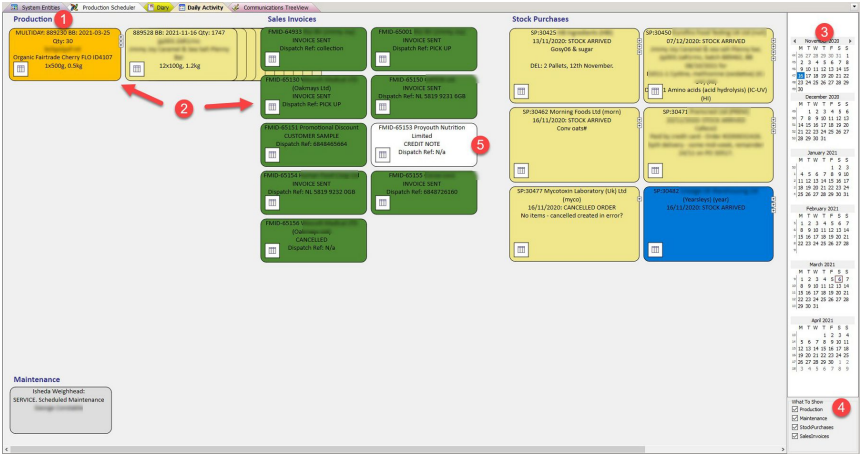
They help to break down the barrier between data and visualization, particularly where a work-surface shows user-understood data, such as "everything you need to know about today"

How do I use Worksurfaces?

Worksurfaces are created by adding data-records to the Resources data-table.

There are examples to copy from on the Orixa website.
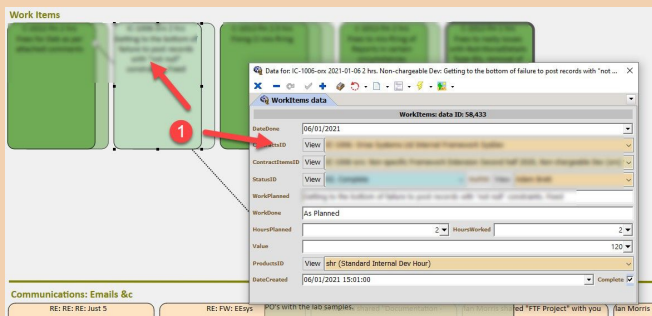
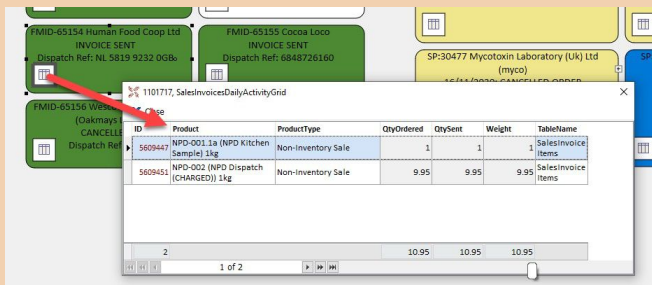## A Worksurface

General WorkSurface

1. The worksurface is linked to "Production", "Sales Invoices" and "Stock Purchases" data in this App, as shown by the user-designed headings. Below each heading the records for the currently selected **day** are shown.

2. Items are **colour-coded** by the developer so that colours with users can understand are linked to particular types of records. Gold-coloured might indicate that it is a particularly large or urgently required Production. Green might show that this Sales Invoice has 100% of stock allocated, with no out-of-stocks and so on.

3. At the side of this Worksurface there is a date-picking component, so the user can scroll between different dates to see the data.

4. At the bottom there is a list of the Business-Objects that are linked to this worksurface, if you do not want to see all the Business-Objects you can "untick" one of these items.

Built in Features of Worksurfaces
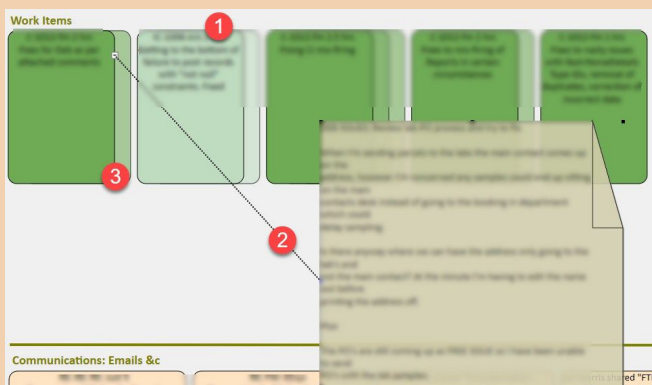
Worksurfaces Access linked records

As in other parts of Orixa, clicking on an item in a Worksurface will open the linked data-record.

Double-click on a WorkSurface Grid icon to show linked records

If the developer has linked a **Resource** to some items on a worksurface an extra icon will show on the item, as seen in the image. Double-cliciking on this icon will open the resource.
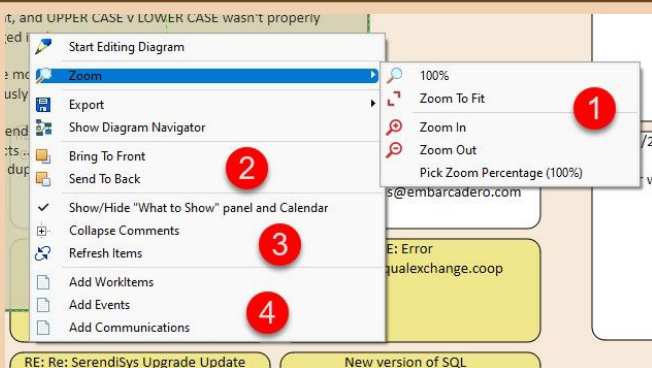
Most commonly this will be a grid or chart of data relating to the selected item.

Worksurfaces Detail

Worksurfaces have some additional useful features.

1. The Item can appear as one or more "stacked" cards. This is useful to create a visual cue as to the "size" of the particular item. If a Sales Order is very large it should show as 2 or 3 "stacked" cards, so users immediately know it is more valuable.

2. If Comments, Images or FileNotes are linked to any record, tiny plus icons will appear on the side of the item. Clicking on the "+" will open a new item showing the data. Double-clicking on this new item allows editing of the record.

3. Different records of the same data can be colour-coded to pass information on to the user.

Worksurfaces main menu

The Worksurface has a context menu, accessed with a right-click. It allows access to programatic actions from the worksurface.

1. The Worksurface has "Zoom" settings allowing the user to expand and reduce its size.

2. As multiple items can stack on top of each other, the menu includes a "bring to front" and "Send to back" action. But remember that clicking on any item will bring it to the front. This action is most useful if you select **multiple items.**

3. If you have opened multiple links on a worksurface, remember the "Collapse Comments" action. This allows you to immediately collapse all opened links. And use the "Refresh Items" action to update

3. the worksurface if new data has been added to the database.

4. The bottom of the Worksurface menu will contain "Add [BusinessObject]" actions, if the user has the appropriate security. These allow a user to directly insert new records for these Business Objects and show an edit window.
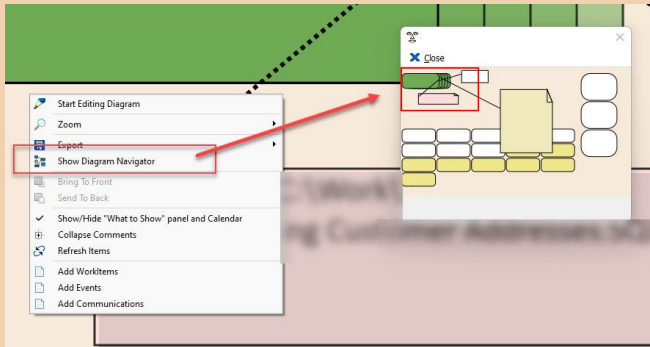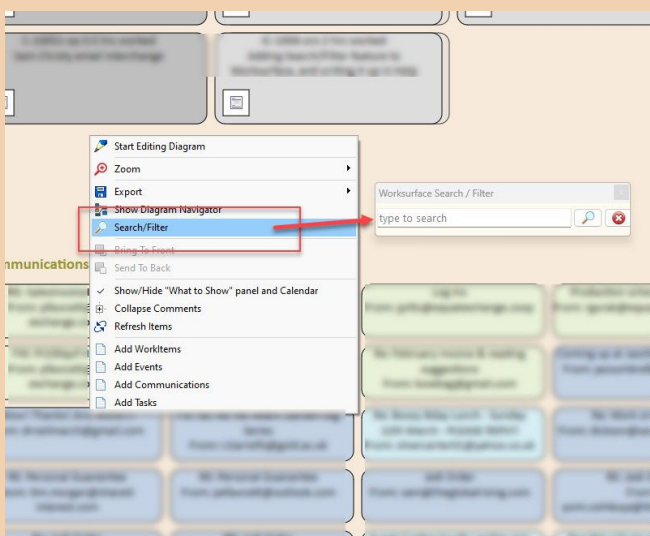

Diagram Navigator

If the Worksurface contains a large number of items it may be too large for a user to see all its content.

In this case the user can open the "Diagram Navigator" from the context menu. It shows a simplified image of the diagram, with a red-box indicating the currently visible area.
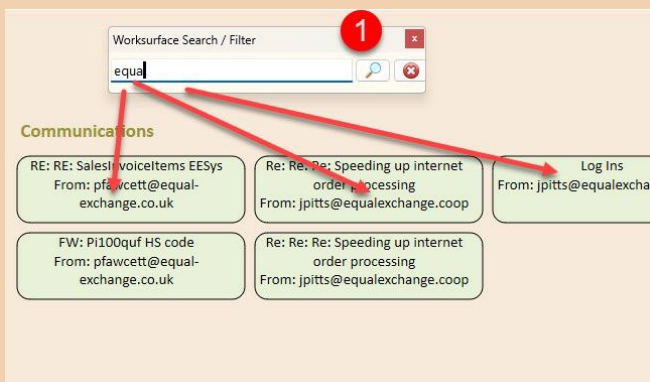
Users can **drag** the red box around the Diagram Navigator in order to see any part of the diagram.

Worksurfaces Search/Filter

If a Worksurface contains a large number of items it may be hard for a user to find the content they want.

In this case they can open the "Search/Filter". This shows a search-window, as shown in the image on the left.

Worksurfaces Search/Filter active showing only a limited number of items

When the user types text into the Search/Filter field and clicks the "Search" button (shown at 1., in the image) or presses the ENTER key, all items on the worksurface are hidden **except** for those containing the search text.

To clear a search click the red "clear" button, or press the "ESC" key.

Editing and extending Worksurfaces

The process of adding worksurfaces is a process which should be undertaken by a staff member who has some training. Full details of worksurface creation and design are covered in the "Administrator's Guide" section of the documentation.

However it is useful for general users to know that worksurfaces can:

1. Show records in a range of colours, arrangements, shapes, sizes and "stacking" depending on settings chosen by the designer.

2. They can be generated either based on criteria such as "date" (called a Calendar Worksurface) or by a selection based on "all the children of record x"

3. Users can drag and move items on a worksurface, and change their shape and size, allowing users to "open" items to see more information if they wish.

4. Each time a worksurface is refreshed the data resets to the predesigned colours, shapes, sizes etc.