ONESolution Finance Screen Navigation

All ONESolution Finance screens have the same basic visual structure, consisting of a **Ribbon Bar** for navigation and options, and a series of **Dockable Panels** for data (Figure 1).
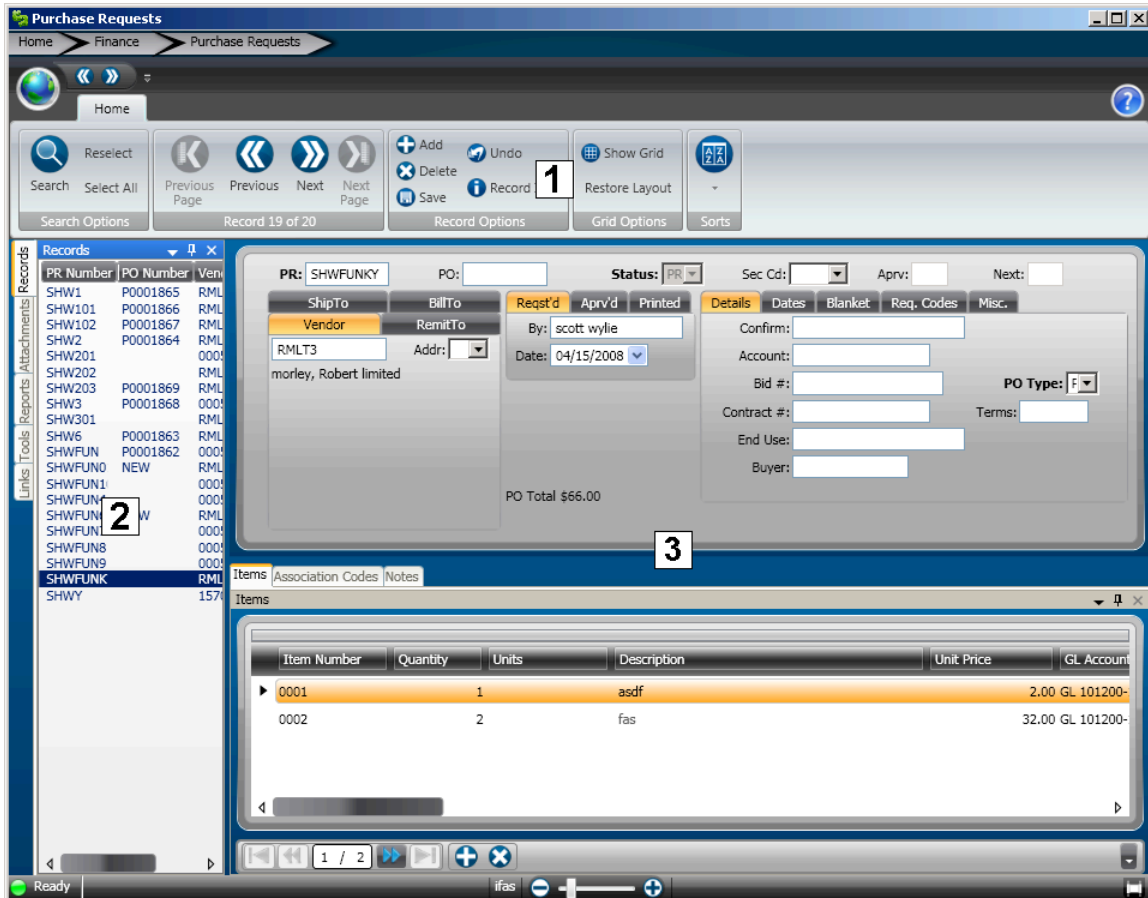

Figure 1: Finance Screen

The **Ribbon Bar** 1 contains most of the buttons and menus that you will use to control the functions of the screen. These functions include browsing records, going into Add or Search mode for the screen, switching between grid and non-grid mode, selecting different sort options, and bringing up lookup dialog boxes, in addition to many other functions.

There are two types of **Dockable Panels**: **Option Panels** 2, and **Data Entry Panels** 3. Dockable panels can be rearranged to suit the user's needs.

The **Option Panels** include the Records, Attachments, Reports, Tools, Links, and Favorites panels. All screens have the Records Option Panel, which can be thought of as the search results for the set of data you are working with. The other Option Panels may or may not appear for a given screen, depending on their applicability.

Each **Data Panel** contains a related group of data entry fields. All screens contain a main panel in the top portion of the screen, below the Ribbon. The data in this panel corresponds to the selected entry in the Records Option Panel. Below the main panel may be one or more child panels organized by tabs (Figure 2).
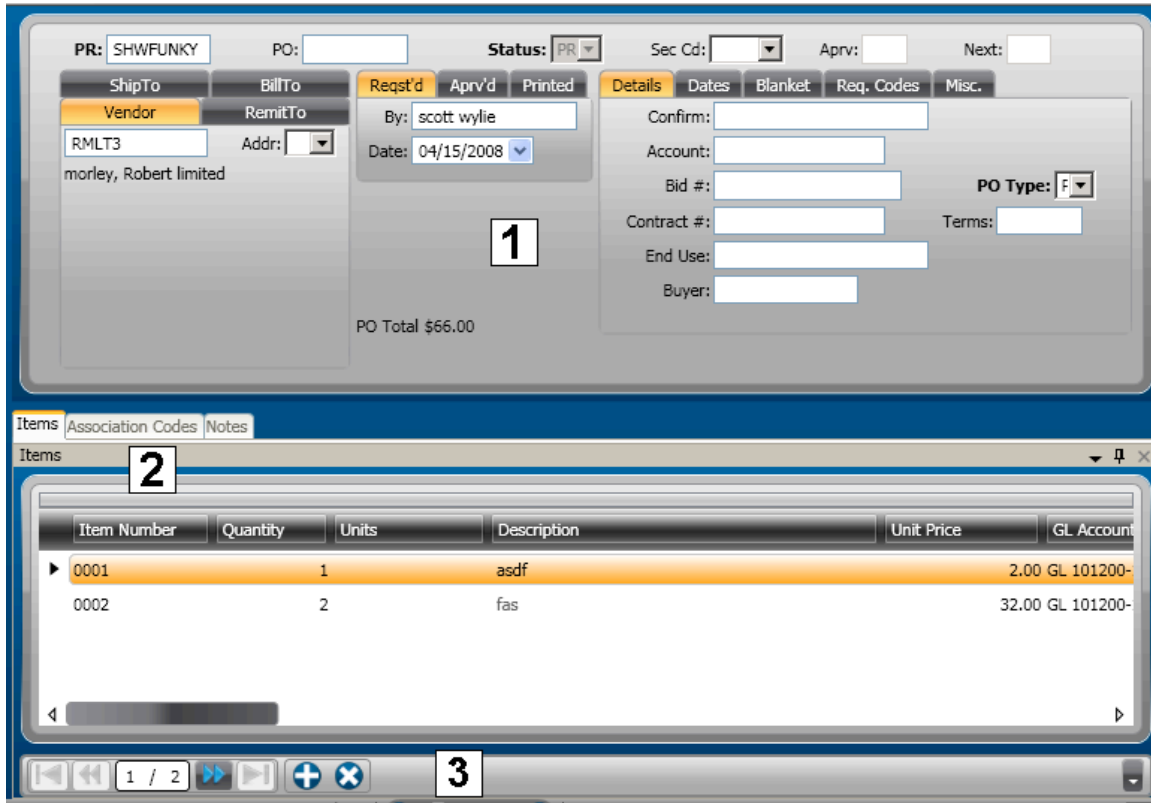

Figure 2: Data Entry Panels

Figure 2 shows a top level panel ⬚1, and several tabbed child panels ⬚2. At the bottom of the selected child panel is the Child Toolbar ⬚3.

Now that the main screen components have been established, we can take a closer look at each one.

<p align="center">**The Ribbon Bar**</p>

The Ribbon Bar is based on the interface of Microsoft Office, designed to make the features of the application more discoverable and accessible with fewer mouse clicks. It consists of an Application Menu Button, a Quick Access Menu, and one or more Ribbon Tabs that each contain one or more Ribbon Groups (Figure 3).

Figure 3: The Ribbon

Figure 3 shows the Home Tab of the Finance Ribbon Bar. The Home Tab appears on all screens, and contains the most common functions, which are grouped into several Ribbon Groups. The Groups are Search Options, Navigation, Record Options, Grid Options, Sorts, and Field Options.

The Search button puts the screen into Search Mode, where you can fill in data entry fields as search criteria. Navigation allows you to browse the main panels' records. The Record Options Ribbon Group contains buttons for going into Add mode to add a new record, saving changes, deleting the current record, etc. The Grid button toggles between grid and non-grid mode (see the section about Grid Mode for more details). The Field Options Ribbon Group appears only when the input focus is on a field that supports options, such as Lookup or Seed Generation.

Many of the commands on the Home Tab have Accelerator keys (hot keys) that are available (Table 1).

Accelerator	Description
Control N	Next Record
Control P	Previous Record
Control E	Next Page of Records
Control B	Previous Page of Records
Control G	Toggle Grid
Control A	Add Mode
Control F	Search/Find Mode
Enter	Save Record (When not in a multiline text editor)
Control D	Delete Current Record
Control L	Lookup (when in supporting field)
Control T	Generate Seed (when in supporting field)
Control K	Change to Key-Object format (when in Account field)
Control U	Change to Fully Qualified format (when in Account field)
Control Q	Change to Quick format (when in Account field)
Control S	Show Account Splits (when in Account field)
Control C	Copy Record
Control V	Paste Record
Escape	Undo All Changes to Record
F1	Help
Control-Shift-T	Enable Debug Tracing

Table 1: Keyboard Accelerators

The Home Ribbon Tab appears on all screens with little variation. There are a number of other Ribbon Tabs that appear when applicable. These include the Attachments Tab, the Account Options Tab, and the Pending Approvals Tab. The Attachments Ribbon Tab allows attachments to be loaded and associated with the record(s) on the screen.

The Account Options Ribbon Tab (Figure 6) appears when input focus is on an Account Number, and provides options for account number formats, lookups, and account splitting.
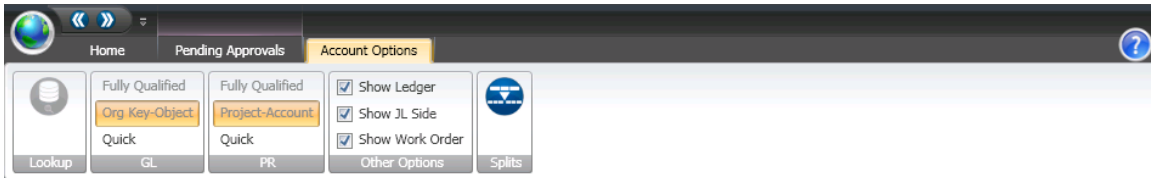
Figure 6: Account Options Ribbon Tab

The Pending Approvals Ribbon Tab (Figure 7) appears when the current record has a workflow task associated with it.
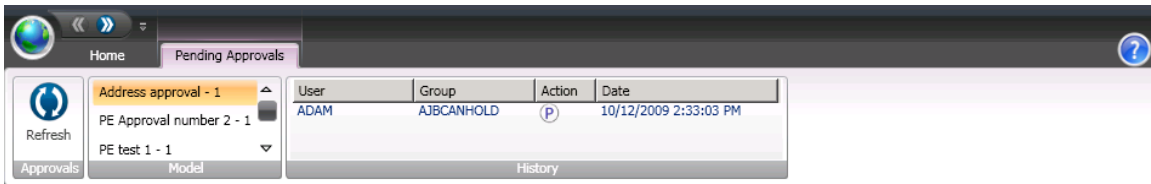
Figure 7: Pending Approvals Ribbon Tab

The Application Menu Button contains menu options for printing a screen and for changing user preferences, such as default ledgers, number of records to fetch, and other settings (Figure 8).
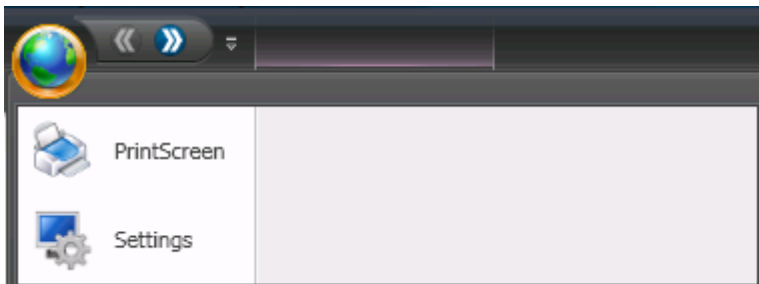
Figure 8: Application Menu

Options Panels

The option panels are generally lists of available options of different types: Records, Attachments, Reports, Tools, Links, and Favorites.

The **Records Option Panel** lists the current Search Results for the main (top) panel data. Clicking on a record in this list will navigate the screen to the selected record. By default, 35 records are shown at a time, and you can page forward and backward using the ribbon. You can also change the number shown by changing your preferences under the Application Menu Button. Keep in mind that the larger this is set, the longer it will take to load data.

The **Attachments Option Panel** (Figure 9) shows thumbnails of any attachments to the current record. Clicking on an attachment will bring up the image viewer for a full size view of the attached document.
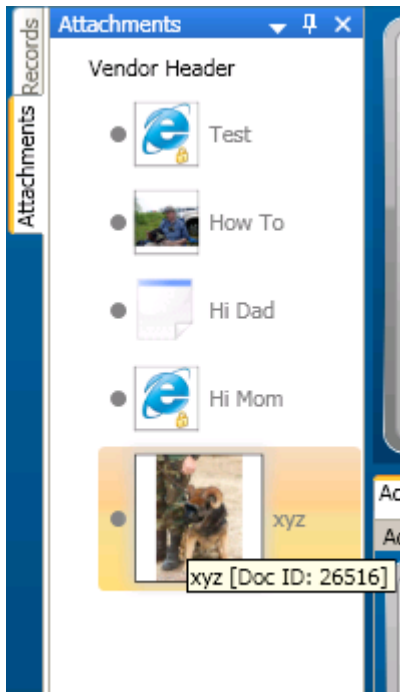

Figure 9: Attachments Option Panel

The **Reports Option Panel** (Figure 10) shows a list of CDD Reports that can be run from the screen, if any. These Reports must be preconfigured, and if configured correctly, can send the current screen data to the report as selection criteria. You can right click a report to get options on how to run it (whether you want to be prompted for criteria or not).
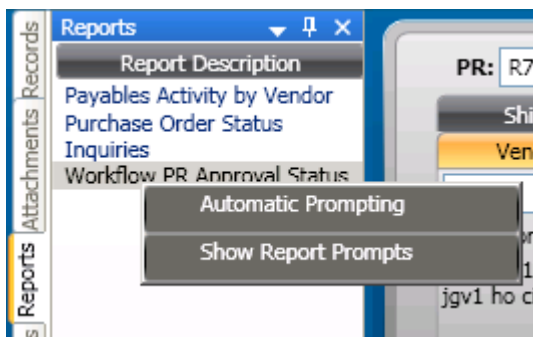
Figure 10: Reports Option Panel

If the current screen has tools associated with it, the **Tools Option Panel** (Figure 11) shows a list of Tools that can be launched.
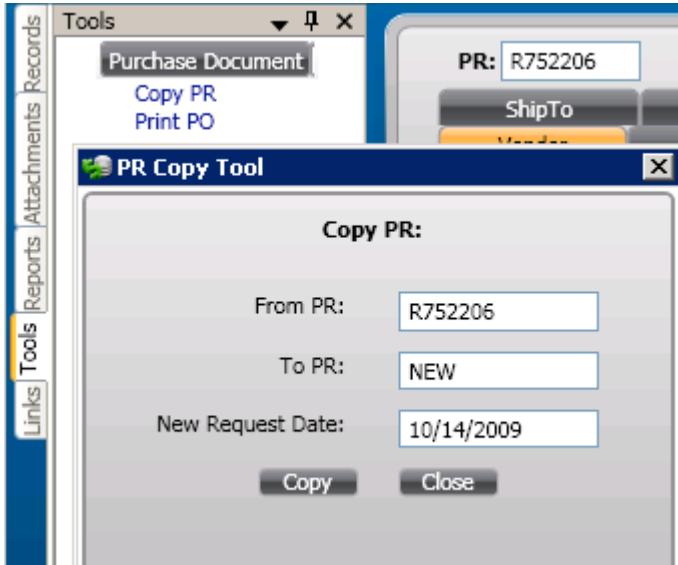

Figure 11: Tools Option Panel

The **Links Option Panel** (Figure 12) allows you to navigate to another screen that is associated with the current screen, without going back to the main Finance Client window. Some Links in the list will send record values from the current screen, so that the linked-to screen uses that data to filter the search results. Some Links navigate to another screen, and some launch classic Finance Jobs on the application server.

Figure 12: Links Option Panel

The **Favorites Option Panel** is similar to the Reports, Tools, and Links panels, but contain options that are configurable for a given environment.

Grid Mode

Many data entry panels support Grid mode, giving the user an option between a data entry Form view (Figure 13), or a Grid view (Figure 14).

Figure 13: Data Entry Form View

Figure 14: Same Panel with Grid View

In the Grid mode, columns can be rearranged by clicking and dragging the column headers, and placing them wherever desired, as well as resizing them. These preferences are preserved so that when you open this screen later, your column order and size will be the same. Also, providing all records have been fetched for a given selection, you can click on a grid column to sort by that column. If there are additional rows in the database that are not loaded in your screen, this sorting is disabled. Normally, you would use the Sort button in the Ribbon to fetch different sorted sets of data.

Toggling between grid and non-grid mode is done using the Show Grid/Hide Grid button on the Ribbon (for the main panel) or on the Child Toolbar (for child panels).

One last feature of the Grid is the ability to Group By a given field. Figure 15 shows PO Items Grouped by the Quantity field.

Figure 15: Grid Group By