Advantzware

Manufacturing & Distribution Software for Packaging

Release Notes v16.8.8 Addendum:
New F1 Lookup

April 2018

New F1 Lookup Screen Functionality (Ver 16.8.8 and above)

The F1 key is used to gain lookup assistance to complete a field in the system where there is a list of options that could be entered to assist a user in finding the proper value to enter. This screen has been historically used many times and had some limitations to it that have been improved for searching and for speed to find things faster.

This is the existing lookup assistance screens that users are accustomed to in the application.

Figure 1 - Existing F1 Lookup assistance Lookup Screen

The lookup assistance screen consisted of a few things where improvement could be made including:

1) Lack of Consistency
2) Sizing where blank space may appear on the right-hand side of screen
3) Having to select a column to search
4) Only being able to search for a single column/value at a time
5) Speed of some lookup assistance files
6) No way to limit the number of records to display
7) Difficult to add new columns/fields to the search

Based on these factors, beginning in version 16.8.8, the lookup assistance screens will begin to be replaced in entry programs with the new Lookup assistance screens that are detailed below. The initial release limited this

to a low use program (This is _ONLY_ available in the O-Q-1 screen and only for the Customer and FG Item# fields initially) for customers to practice with and become more familiar with the new functionality.

The plan is to begin releasing the new Lookup assistance screens in entry programs first, then to lesser used programs as these programs are revised or updated in future releases.

This is the new default display for the new Lookup assistance screen:

Job #	Job #2	Item #	Estimate #	Order #	Cust. #	Due Date	Opened
210328	0	BZOV1000050A99	13188	210328	ZOV100	03/17/2018	Open
210330	0	CT101010	13225	210330	PAGE01	03/17/2018	Open
210339	0	BAKE-12X7X4	11206	210339	STOCK	03/20/2018	Open
210340	0	BLag1000002A99	13305	210340	Lag10001	03/20/2018	Open
210343	0	BABB1000037A00	13249	210343	ABB1000	03/23/2018	Open
210346	0	BGoose0001A99	13316	210346	Goose	03/23/2018	Closed
210350	0	BIBM1000110A00	13317	210350	IBM1000	03/24/2018	Closed
210352	0	BIBM1000110A00	13317	210352	IBM1000	03/25/2018	Closed
210355	0	BZOV1000055A99	13319	210355	ZOV100	03/29/2018	Open
210356	0	BZOV1000056A00	13320	210356	ZOV100	03/29/2018	Open
210356	1	BZOV1000057A00	13321	210356	ZOV100	03/29/2018	Open
210372	0	LAG-6Pk-IPA	12872	210372	Lag10001	04/03/2018	Open
210373	0	LAG-6Pk-IPA	12872	210373	Lag10001	04/03/2018	Open
210378	0	CT101010	13225	210378	PAGE01	04/03/2018	Open
210379	3	IBM-24x24x24	5500	210379	IBM1000	08/01/2018	Closed
210379	2	IBM-24x24x24	5500	210379	IBM1000	06/01/2018	Closed

Figure 2 - New Default New Lookup assistance Screen

The new Lookup assistance screen search is designed to improve the functionality and consistency of Lookup assistance screens throughout the system. These screens will dynamically scale to optimize the display and results to speed entry and lookup assistance find the results desired.

Advanced Search Icon – This icon will toggle the display from the default to the advanced search defined below. Clicking this again returns the user back to the default search again.

Reset Button – Clears the search criteria and defaults back to the initial display default

Search Area – This is a global search value that will search ALL fields that are search-able (Search-able means that the column is highlighted) using a wildcard search.

- Dynamic - This is a dynamic search meaning that it will immediately begin to filter your results based as it is entered.
- Wildcard - Since this is a wildcard search, it looks for the search criteria in any part of the results displayed.
- Multiple Column Search – Since this is a wildcard search, if multiple columns are desired to be searched at the same time, a space can be entered between values to indicate searching of multiple columns. Since this Lookup assistance screen has Job # column highlighted it is the first search criteria that will be filtered. Since the Item # is the second column that is search-able (Job #2 is NOT searchable since it is not highlighted), then if the desire is to search for Job # that contains 'XXX' AND with an Item # that contains 'YYY' to be filtered at the SAME time, then the entry would be entered as "XXX YYY" where XXX represents the wildcard value to search for in Job # and YYY represents the Item # desired. Both of these values would need to be present for the result set to contain values. Searching for a single value of 'XXX' requires nothing other than the entry of 'XXX' and the result set will display any Job # value that contains 'XXX'. It will also display any Item # that contains 'XXX' as well. In fact, it will display any Job #, Item #, Estimate #, Order # or Cust. # as well since these columns are highlighted which includes them in the search results.
- Default behavior: If the Lookup assistance display results in a record count of less than 1,000 records, then this search (Let's call it the Google-like search), will be the default search method displayed when the user presses F1 for the Lookup assistance on a field. This is the default because it allows the fastest search and usually gets results the first time. If there are more than 1,000 records to be displayed by default, then this search takes longer to load, so the Advanced Search (See below) display will be presented by default for performance reasons, but the user can select the alternate search if they desire by clicking on the Advanced Search icon.

Previous Button – This is a paging option to turn the page backwards (Go back 1 page of results) if the results are more than 1 screen in length. It will become active only after the results exceed 1 page and the user has moved past this first page of results.

Next Button – This is the paging option to turn the page forward (Go Forward 1 page of results). It will become active if the results exceed 1 page.

OK Button – This is the button to click once the proper record has been found and highlighted to input the record desired into the field that you came from to launch the Lookup assistance screen. By default, the first record in the search page will be highlighted to indicate this is the record that will be selected when the button is pressed (Or the return key is pressed).

Cancel Button – This cancels the search and returns the user back to the entry field.

Highlighted Column – The highlight of a column indicates that the column is sort and search capable, and also indicates the columns that will be searched using the default search.

- Sort – Clicking on the top of the column will sort the values in that column from A-Z. Clicking a second time will reverse the search from Z-A.
- Search - That means that values in the search will find any combination of the search criteria
- Search Order – The column placement that is needed for a multiple column search

Figure 3 - New Advanced Lookup assistance Screen

The Advanced Search screen is designed for advanced searching needs. This usually includes fields that have different formats (For example: Non-text values, different user digestible format, dollar amounts, dates or lists) which are not common search criteria. In addition, if the Lookup assistance result set contains a large number of records, then for maximum performance, this will be the default screen for the Lookup assistance screen search. Again, clicking the Advanced Search Icon will take the user to the alternate search screen. A performance impact will result, but it is available if desired.

Column Heading Filter – At the top of each column is the ability to enter a value that will search that column only. Data can be entered in multiple columns at the same time which means that all of the values entered must be found in order for results to be displayed. By default, the data entered uses a _Starts With_ search meaning that the value entered will find records that Start with the data entered. For wildcard search, see Use Wildcards.

- Multiple Columns – Data can be entered in any or all of the column headings if the value is a text value.
- Dates – Date searches will only search the actual date entered.
- Boolean/Logical/True or False/Yes or No – Logical values will be On/Off type of search.
- Drop Down – Values that have a list of values will provide a drop down of the options for search.

Find Button – This will initiate the search based on all the columns with search criteria.

Reset Button – This will reset the search fields criteria back to blank.

Use Wildcards – This option changes ALL the column heading data into a _Contains_ search so that any part of the value of data entered is found a record will be returned. This applies to all normal text strings only. The same logic applies such that all columns must find a match together to be returned.

Future Planned Additions:

The following additional improvements are expected to be added in future releases:

1) Data driven – The ability for the Administrator to configure the Lookup assistance screen options
    a. Column order – Which columns will be displayed and in which order (Other than the first Column which is always the value to enter into the field being populated when the Lookup assistance screen is initiated)
    b. Column Sort – Default search is ascending or descending (A-Z or Z-A)
    c. Record Count – The number of records that determine which Search display will be the default (Google or Advanced)
    d. Alternative Search Available – If the user can select the alternate search method or not (To control performance impact)
    e. Use Wildcard Default – If the Use Wildcard option will default on or off
    f. Page Break Count – The number of records to display before users has to select Prev or Next buttons as an alternative to an elevator
2) Translations – Translations to accommodate different language settings
3) Sort order – Display if the sort is Ascending/Descending
4) Record/Page Counts – Number of records and pages of the result set