Quick Find

Summary

A new form has been created allowing users to quickly access the details page of a record simply by typing the record's key value into one of the multiple input options available.

Goals

Main Goal

- Reduce the query cost and user wait time of reading multiple records upon opening a list page form only to have a user filter to find a specific record.

Secondary goals

- Reduce the number of clicks and total active user interaction time to navigate to a details form page.
- Group frequently searched forms into one central workspace to help streamline a user's experience.

All small things, but compounded across an organization, we would hopefully see an improvement in application performance and the user experience resulting in increased customer satisfaction.

Design tenants

- No further technical development required.
  - Allow configurations and setups to dynamically drive how the form can be utilized within each organization as well as with each user.
- No security configuration required.
  - The main quick find forms have been added to the common main menu and their security duties have been added to the SysUser role.
  - All the Admin setup forms have been added to new duties.
- Minimal user setup.
  - Although there are a few options each user can configure if they choose, quick find is ready to go once the initial organizational setup is complete.
- Clean and intuitive form design and user interaction.

User interface overview

Find options

There are four options available to find a record within the quick find form:

- Prefix find
- Quick filter find
- Grid find
- Group-string control find
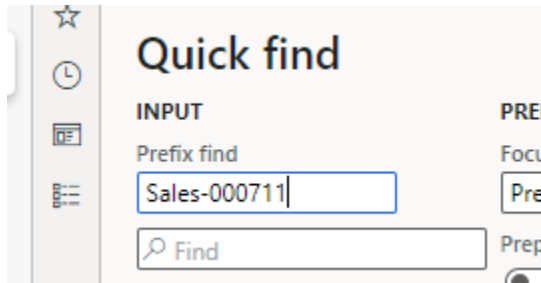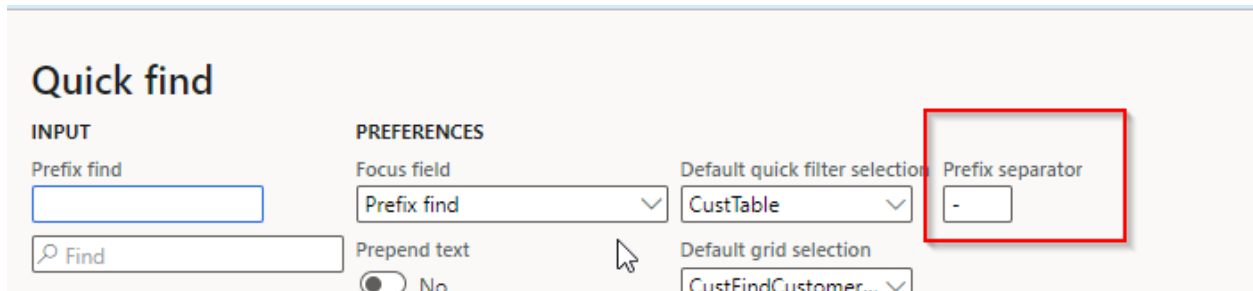
Prefix find

This option allows a user to type the prefix associated to a menu item and then input the find value. For example, assume "Sales" is the prefix assigned to the *Sales order table details* menu item. Inputting Sales-000711 into the control will open the details page for sales order 000711 if the user has access to that menu item.

Each user can configure their own prefix separator in the preferences section of the quick find form. In the previous example, "-" was set by the user.
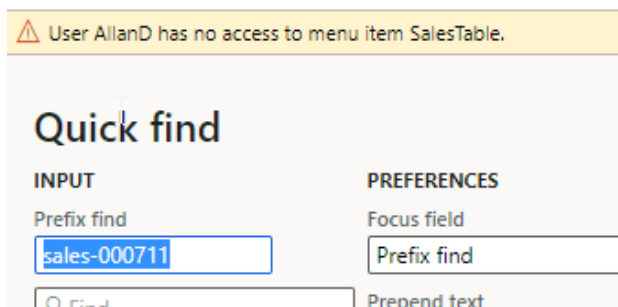

Had "/" been configured as the prefix separator, the user would have needed to input *Sales/000711* for the system to find the correct sales order.

If the prefix separator is left blank or a space value is entered, the space bar will act as the separator. In that scenario, *Sales 000711* would then find the correct sales order.

Typing in a prefix to a menu item that the user does not have access to will show this warning and not open the details form.
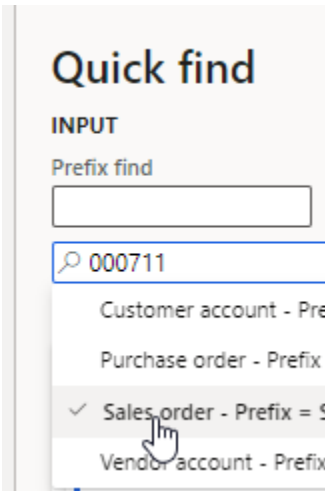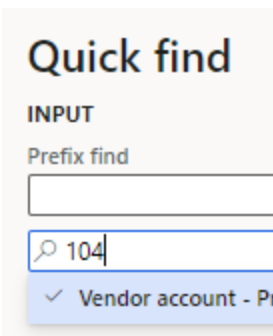
Quick filter find

This option is based off the standard quick filter control. Rather than displaying fields from a grid in the drop down, however, it displays the configured quick find menus items a user has access to.

For example, typing in 000711 and selecting the sales order option in the displayed drop down will open the details page for sales order 000711
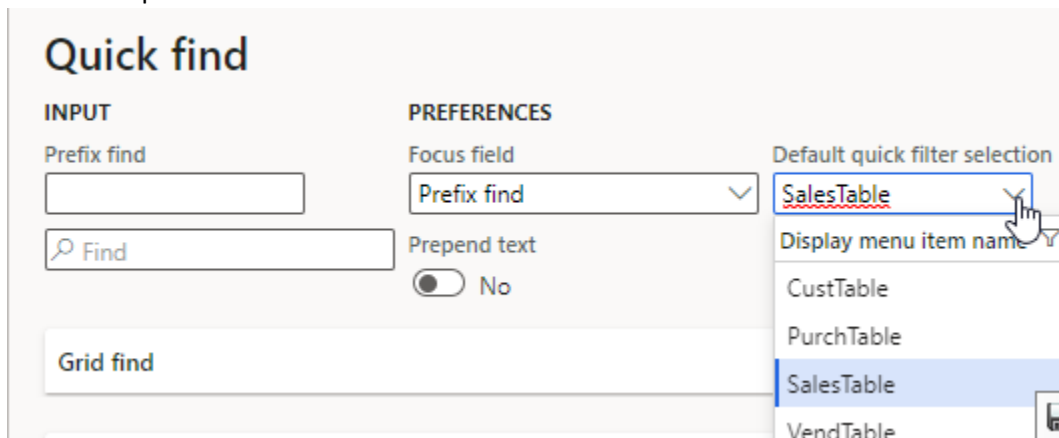

For a different user that only had access to the vendor form and not sales orders, the drop down would not show the sales order option as shown below.

Each user can configure the default menu item to be activated in the in the quick filter control when the form first opens.

Grid find

This option utilizes the *form part* design pattern leveraged in standard workspaces. These *form parts* leverage a quick find control that show associated fields for a menu item. In this example, typing in 00071* and selecting sales order will display all sales orders that meet that wildcard criteria.

A user can then click any of the fields in the found records within the grid to open the associated details page.

Any configured *form parts* a user has access to will be displayed in this section.

Each user can configure the default form part tab page that is activated when the quick find form is opened.

Group- string control find

This option creates a fast tab for each configured quick find group. Within each group, string controls for each configured menu item within the group are displayed if the user has access to them.

Users can type a value in the control or select from the drop down if the extended data type of the key field is associated to a backing table.

Focus field

Allows the user to choose which of the 3 find options the cursor should focus to upon opening the quick find form.

Setup

Quick Find Menu items

Each organization defines what menu items are available to the quick find form by populating the *Quick find menu item table.*

System Administration ->Setup-> Quick find -> Quick find menu items

For most of the system menu items, logic will populate the necessary meta data fields. In scenarios where the meta data is not set up in a way that the logic can find the right table and field, one can manually set the key table name field and key field name field for each menu item and the system will then populate the associated ids.

Setup fields

Label Id

The label that is shown in *Quick Filter Control Find* dropdowns and for the *Group-String control find* controls.

This value initializes from the extended data type of the key field when creating a new record in this table.   It can be overridden with another label id or simply with static text.

Prefix

Allows each menu item to be associated with a value that is used in the *Prefix find* option in the quick find form.

Prepend text

Allows each menu item to be associated with a value that will be prepended to the user input for either the *Prefix Find* or *Quick Filter Find* options.

In the screenshot below, the prepend text is set to 000

If a user inputs Sales-711 into the *Prefix find* option, 000 will be prepended to 711 and the sales order details page for 000711 will open.

Similarly, typing 711 in the quick filter field and selecting sales order will do the same.

However, inputting 000711 would not open the details page as 000000711 does not exist.

Within the preferences section, each user can toggle if they want to prepend text or not to their input value.

Quick Find User Menu items

Each user can override the prefix and prepend text values that have been setup for the organization. *Common->Setup-Quick find menu items.*

When a user adds a menu item in this form, the prefix and prepend text values are inherited from the organizational menu item setup.

A user can then override the values to what they prefer.

The user would now just need to type in 11 (rather than the 711 required by other users) into the *quick filter find control* to open the details page for sales order 000711.

Prefix find would open the details page for sales order 000711 with either SO-11 (utilizing the user override setup values) or Sales-711 (utilizing the organization default setup).

However, SO-711 (combing the user overrider prefix 'SO' with the organizational text to prepend '000') would not find any sales order as it would search for 0007**7**11

Similarly, Sales-11 would also not find a sales order as it would search for 00011.

Each label description in the *quick filter control* will find the correct setup record (either the user setup record if it exists, or the organizational one if the user has not overridden it) and display the associated *Prefix* and *Prepend text* values.

Quick find form parts

Similar to the menu item setup, each organization defines what *form parts* are available to quick find form in the *Grid Find* section by populating the *Quick find form part menu item table*

System administration ->Setup->Quick find- >Form part menu items

The label id field initializes from the label of the selected menu item. It can be overridden with another label or with static text.

There is a validation to ensure that correct menu items are being added. For example, if I add the custTable menu item, the admin receives the error below as it is checking the design pattern of the associated form.

However, the menu item can still be added if the admin chooses to.
For this example, a run time error would occur when the custTable form part is activated (I don't think the error can be caught since the everything is dynamically created).

Quick find groups

If the organization would like to utilize the *Group-string control find*, they must first set up groups and then assign menu items to those groups.

System Administration -> Quick find -> Quick find groups.

The label id field again can either an actual label id or static text.

The system cycles through each of these groups, and if a user has access to any of the menu items associated to that group, a fast tab will be displayed. Each menu item within the group that a user has access to is then displayed.

Journal menu item considerations

Unlike the majority of list pages, journal forms (inventory, ledger, and project) are a little bit different and need additional considerations.
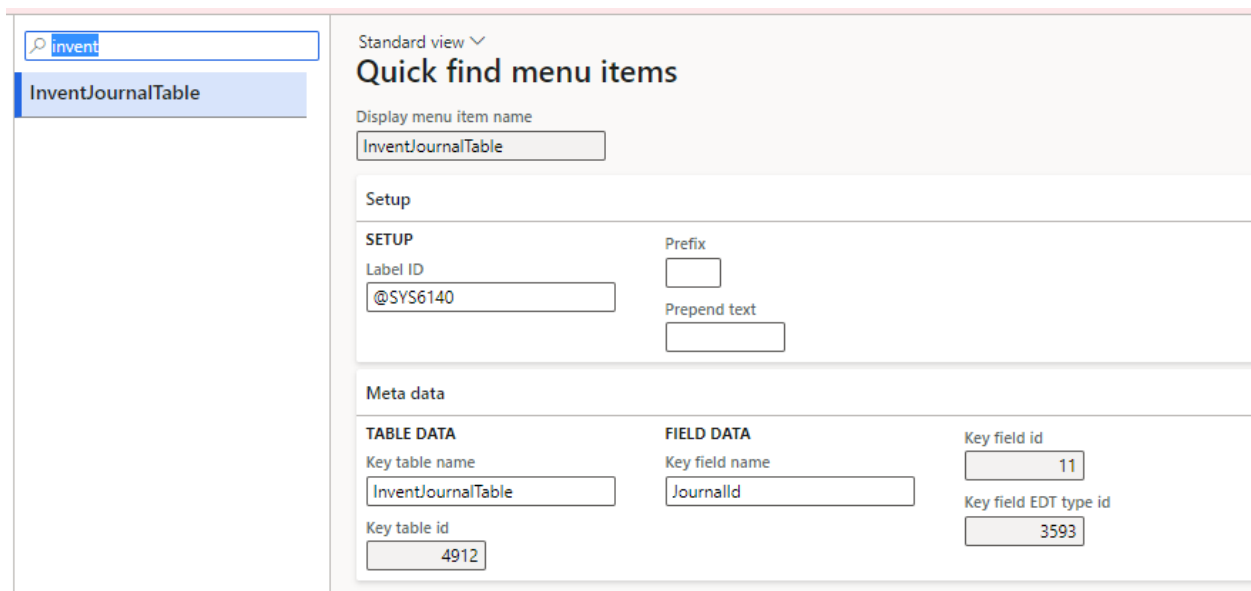
Inventory journals

Each inventory journal type is associated to its own specific menu item.
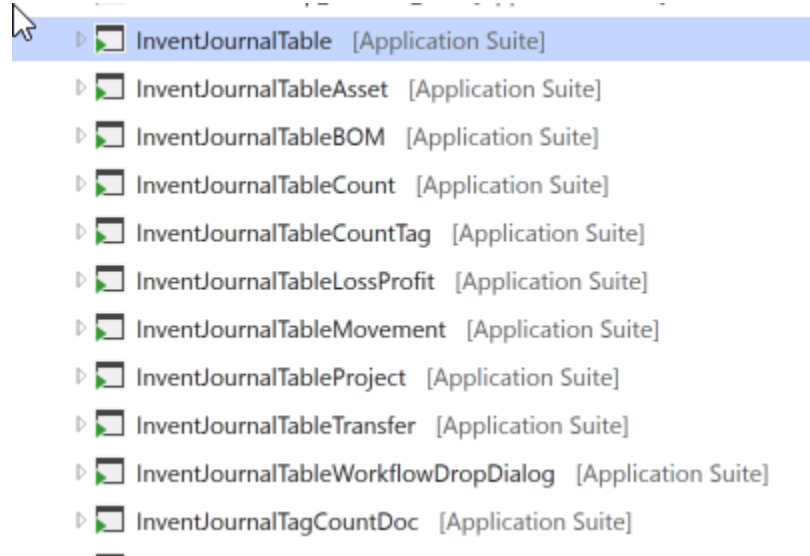
As an alternative to configuring a record in the quick find setup for each of these menu items, a feature has been developed that requires just one record in the setup.

To do so, setup a record for inventJournalTable and set the key table and field name values manually as shown below.

Logic has been added that will open the correct journal form based on the journal type of the journal id the user inputs or selects.

For example, since 00031 is a movement journal, inputting that value will open the movement journal form if the user has access to it.

If a user inputs an adjustment journal (00052) and selects the same control

the adjustment journal form will open if the user has access to it.

This same logic also works in *Prefix find* and within the fast tab groups.

Project journals

There are 4 journals in the project module.

The expense journal can be handled by the ledger journal strategy, and the item journal can be handled by the invent journal strategy.

For hour and fee journals, similar logic as inventory journals has been added. You can set up one record for ProjJournalTable and that will work for both types of journals.
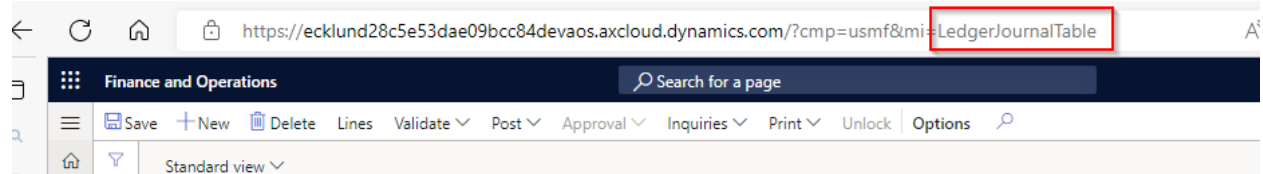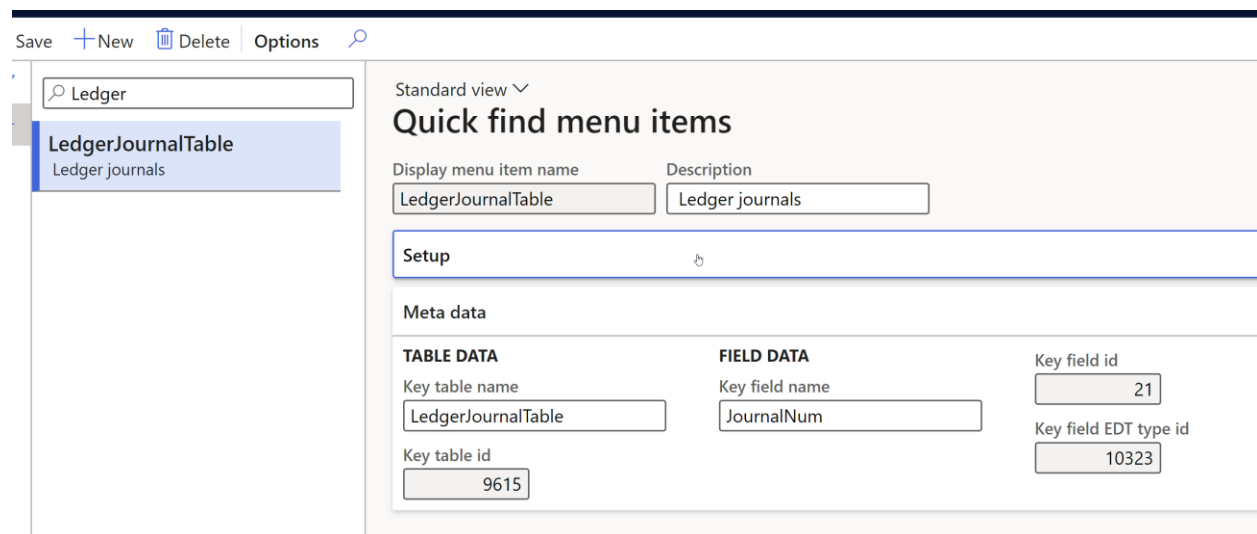
Ledger journals

Unlike inventory journals, users can navigate to the LedgerJournalTable menu item in which all journals are displayed.

If the user clicks on a journal that they don't have access to, nothing happens. If they do have access, then the lines of the journal are shown .

One strategy is just to use one menu item for all ledger journals.

This will bring the user to the main journal table form when the can then clicking on the journal ID to get to the journal lines.

Additional development would be required to get directly to the lines (LedgerJournalTrans) from the quick find form as done for inventory and project journals