INTERFACE AND ENVIRONMENT

USING BPO - WORKING ENVIRONMENT

Understanding the BPO2 working environment and Controls & Functions is important as it minimises confusion when using the system. All **BPO** beginners should familiarise themselves with the following topics in order to get the most out of the system functionality.

ENVIRONMENT

ACTIVE TITLE BAR

- This bar lists the Software Version and Company Name, or test environment name e.g. **CO3 Example Company**.

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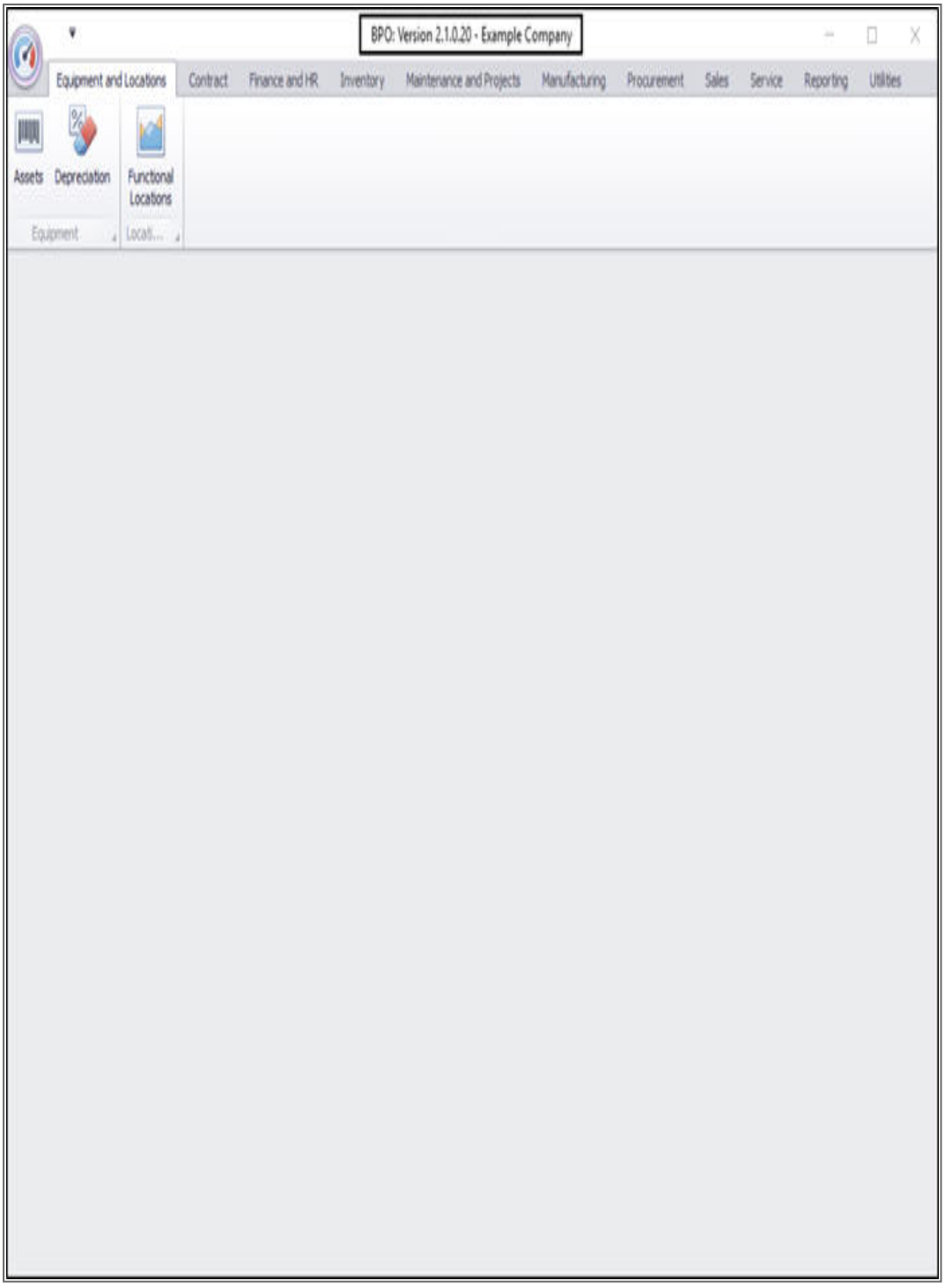

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RIBBON TABS

- These tabs enable you to navigate through the different modules within **BPO**.

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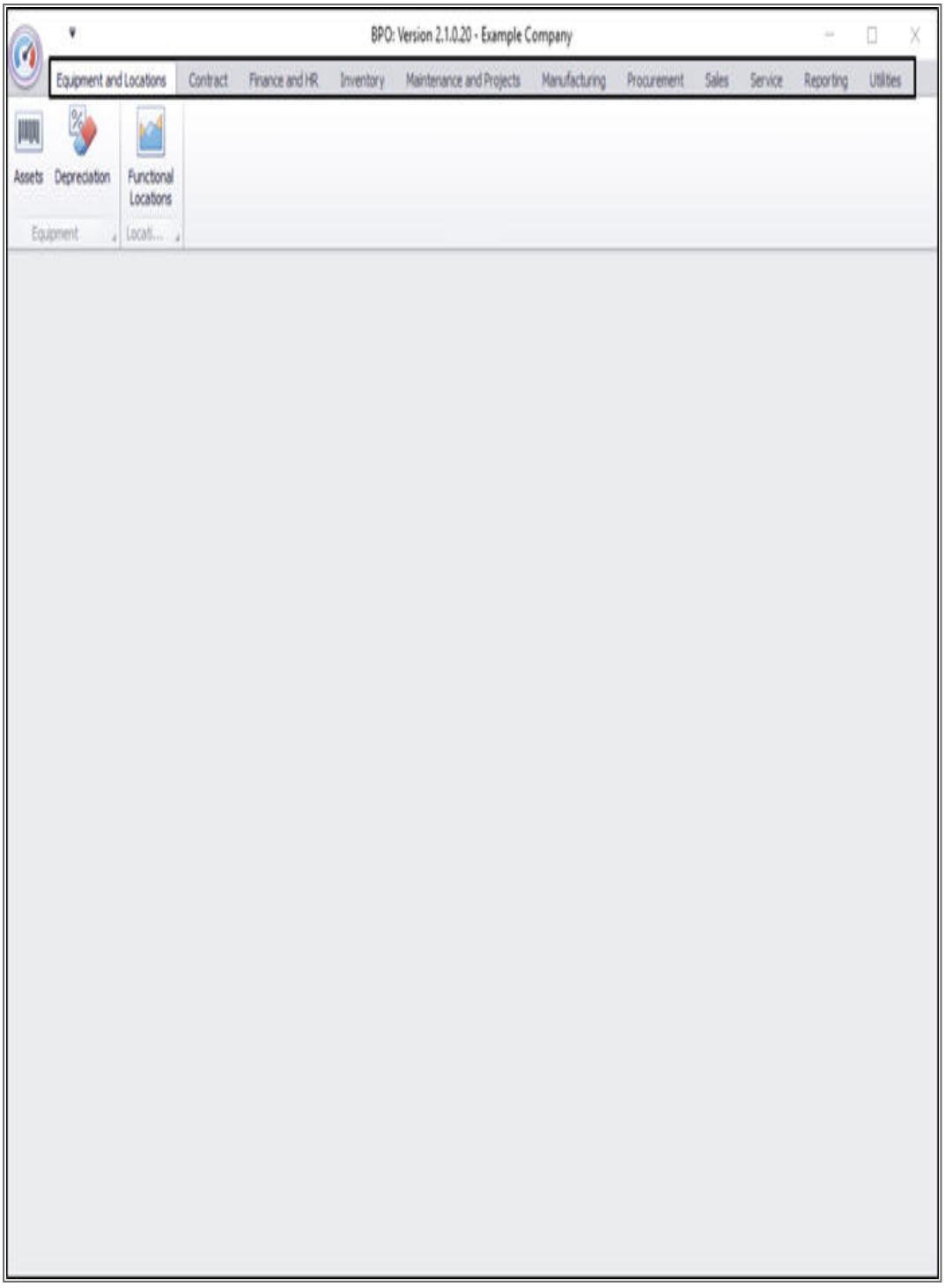

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QUICK ACCESS TOOL BAR

- This can be configured with short-cuts to the screens that you wish to view most often.
    - For further information refer to the Quick Access Tool-bar topic page.

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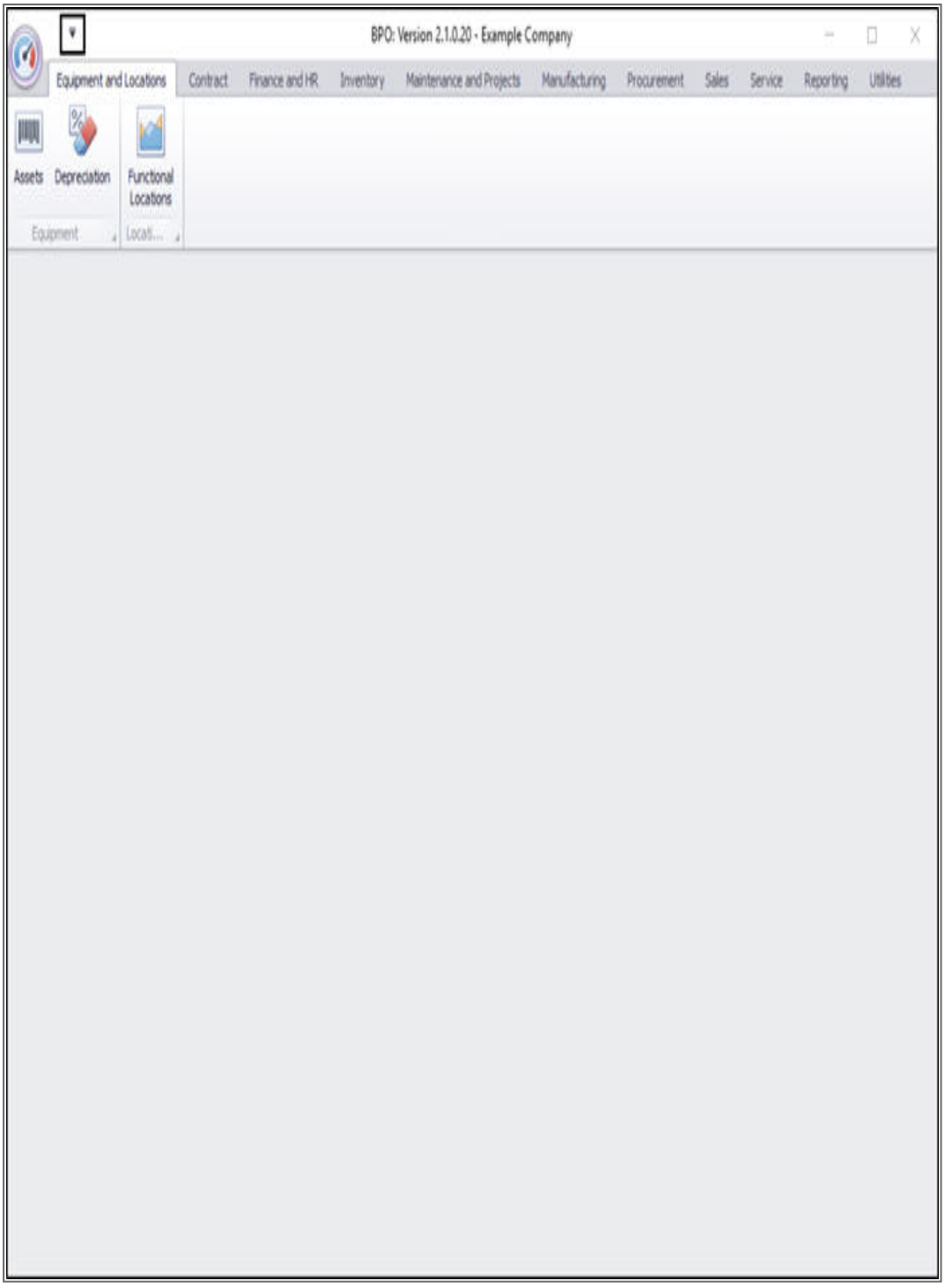

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RIBBON TOOLBAR

- This displays the content of the selected ribbon tab in more detail.
    - In this example, the ribbon toolbar of the ***Maintenance and Projects*** ribbon tab is displayed.

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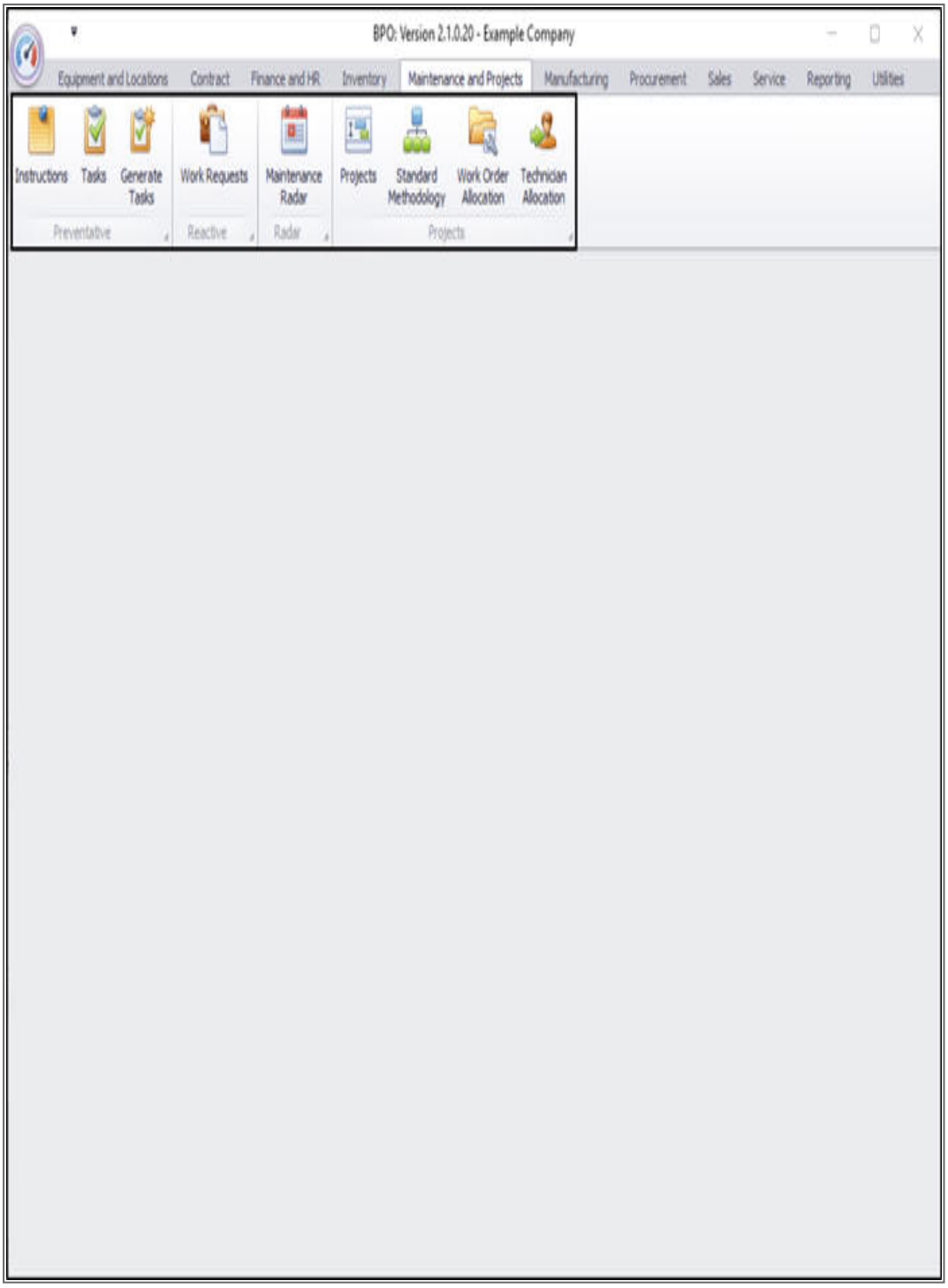

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LISTING SCREEN

- Click on any of these ribbon toolbar icons to open a ***Listing Screen***.
    - In this example, the ***Work Requests*** toolbar icon has been selected within the ***Maintenance and Projects*** ribbon tab.

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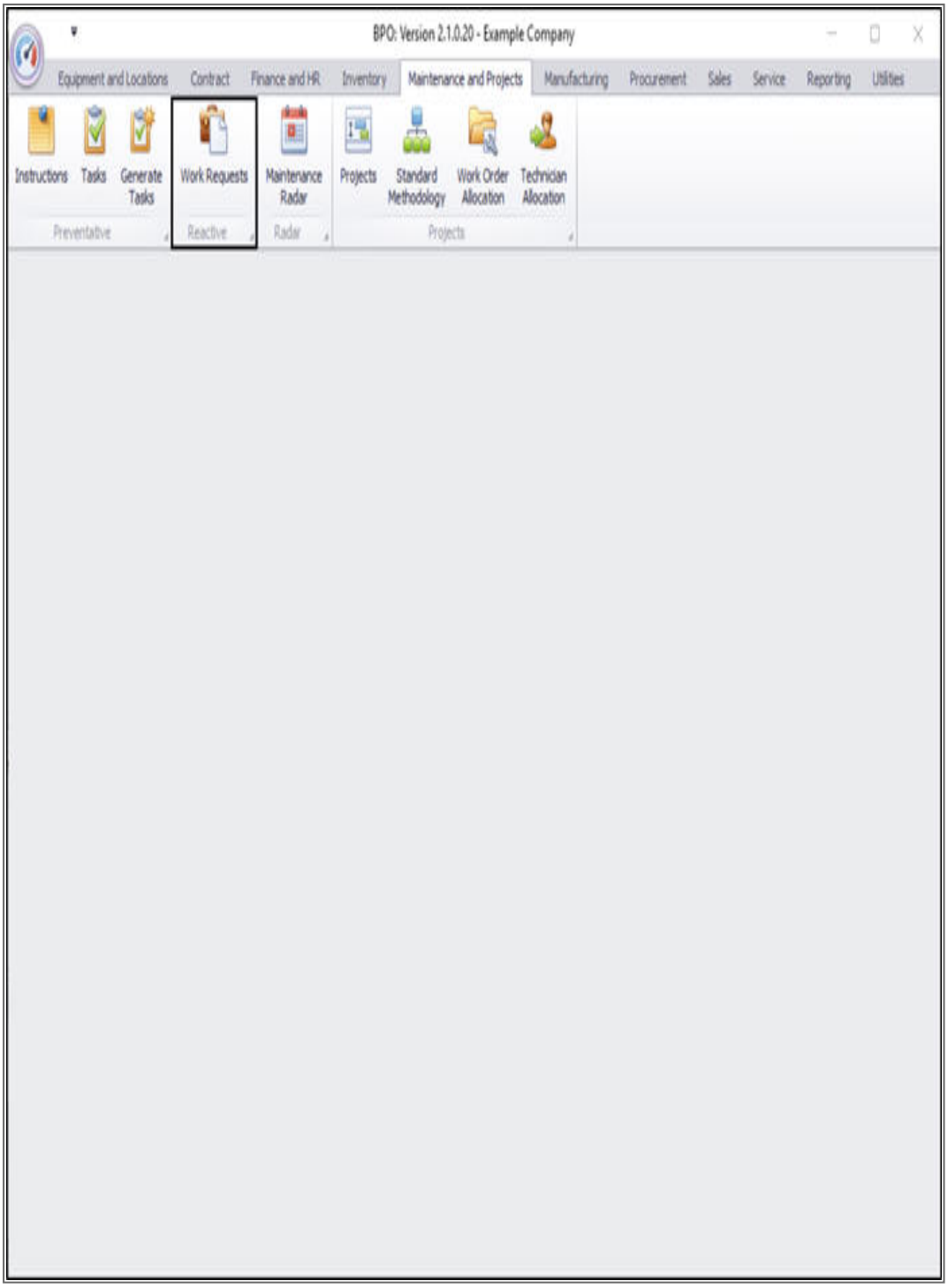

- The ***Work Requests*** listing screen will be displayed, and the ***Active Title Bar*** will now display the title of the selected ribbon

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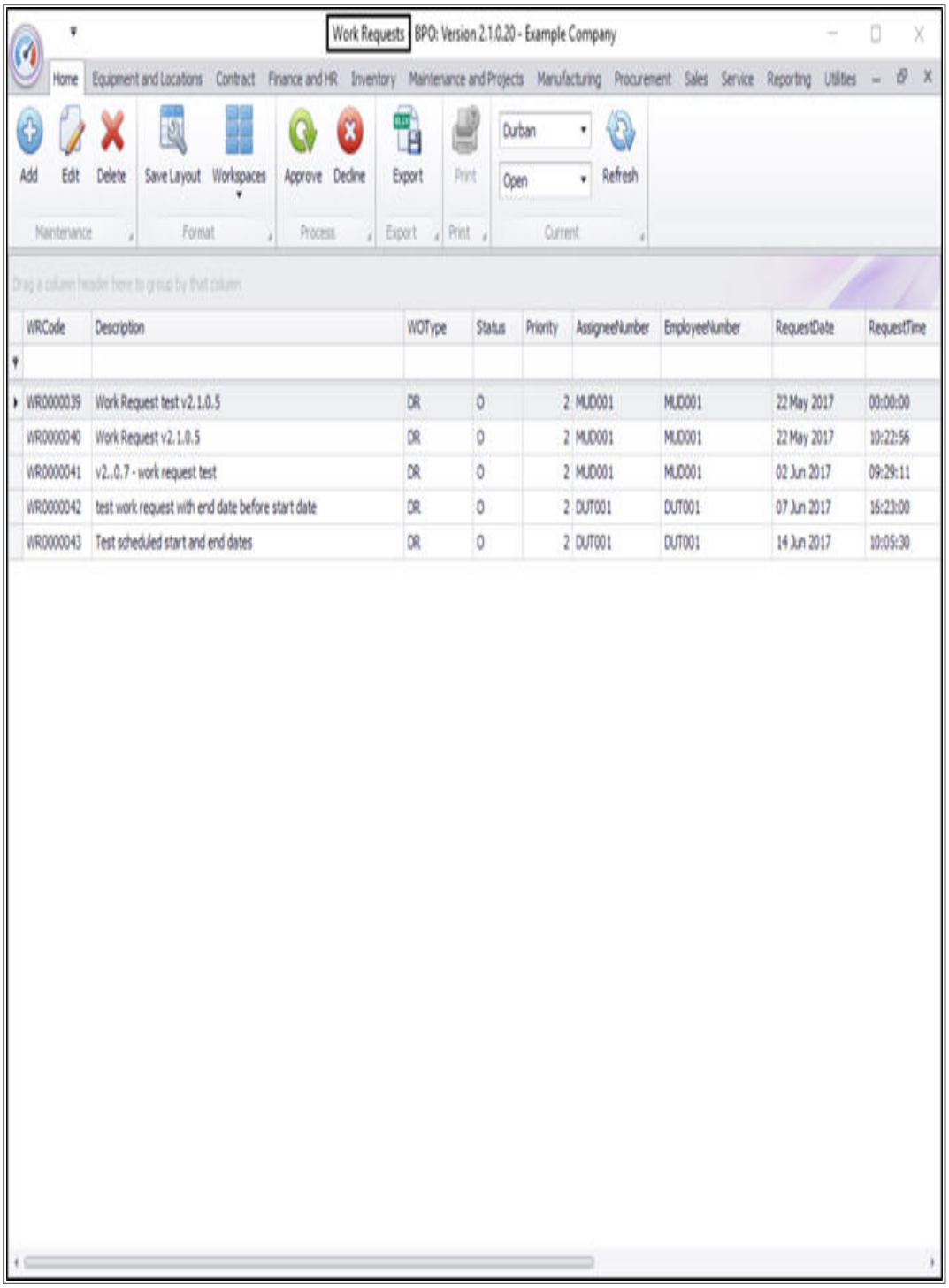
toolbar icon as well as the software version and company name.



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LISTING SCREEN OVERVIEW

DATA GRIDS, ROWS AND COLUMNS

Listing Screens contain one or more ***data grid***(s) of ***rows*** and ***columns.*** These contain data relating to the selected ribbon toolbar icon.

- In this example, the data grid contains rows and columns with information relating to the ***Work Requests*** ribbon toolbar icon.
    - **Rows** are selected by either clicking anywhere on the row or in the case of dragging and dropping a row, by specifically clicking in the row selector column.
    - **Columns** are selected by clicking on the column header above the column of choice.

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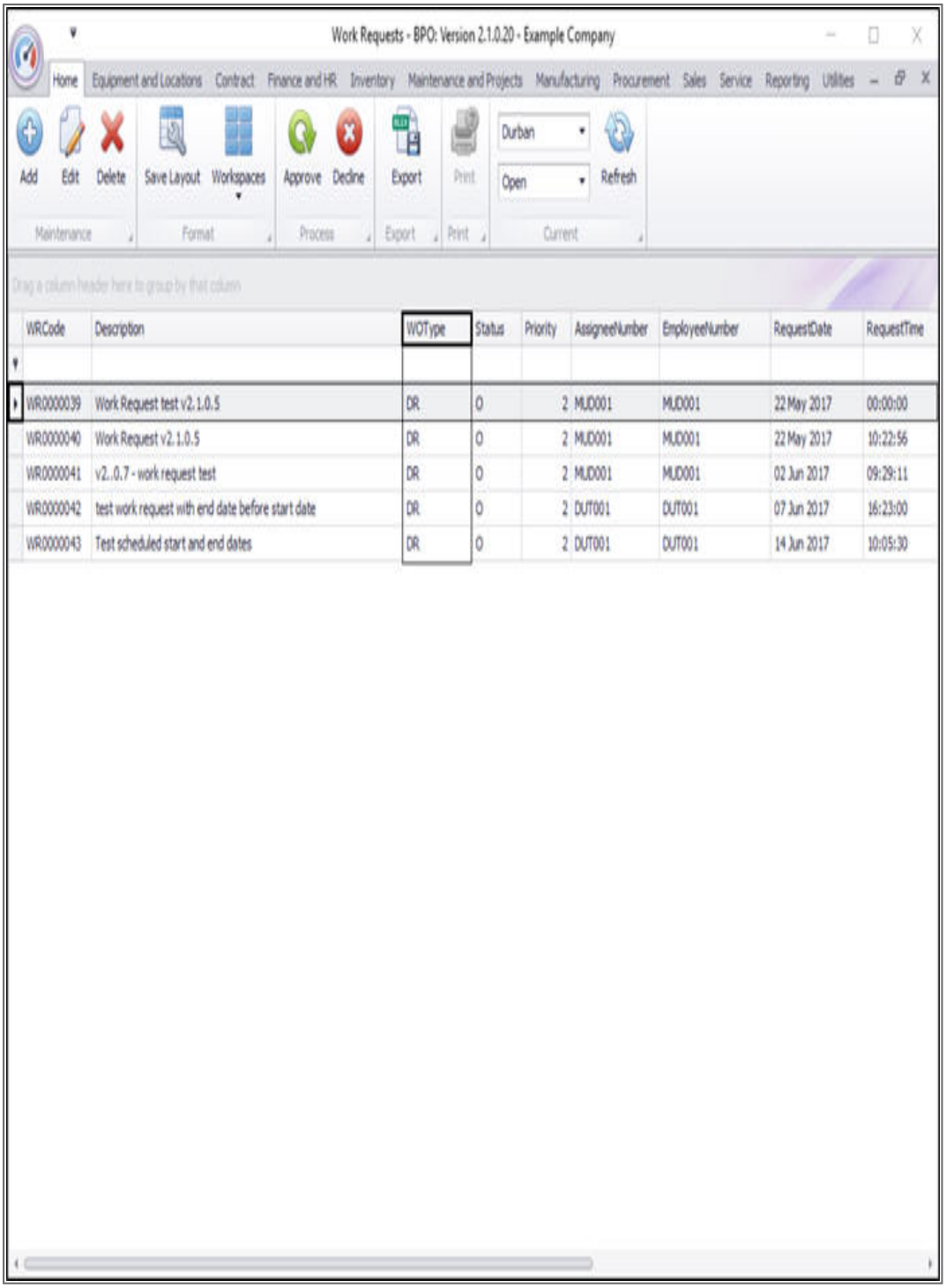

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ACTION BUTTONS TOOLBAR

- When you open a ***Listing screen***, the ribbon toolbar is replaced by the ***Action Buttons toolbar***.
- This toolbar includes icons that are used to perform functions within the listing screen e.g.
    - **Maintenance** functions
    - **Format** functions
    - **Processing** functions
    - **Export** functions
    - **Print** functions and
    - **Current** Functions.
- The Action Buttons toolbar may vary according to the ribbon tab and subsequent ribbon toolbar icon selected.
    - The example displays the icons available in the ***Work Requests*** action button toolbar.

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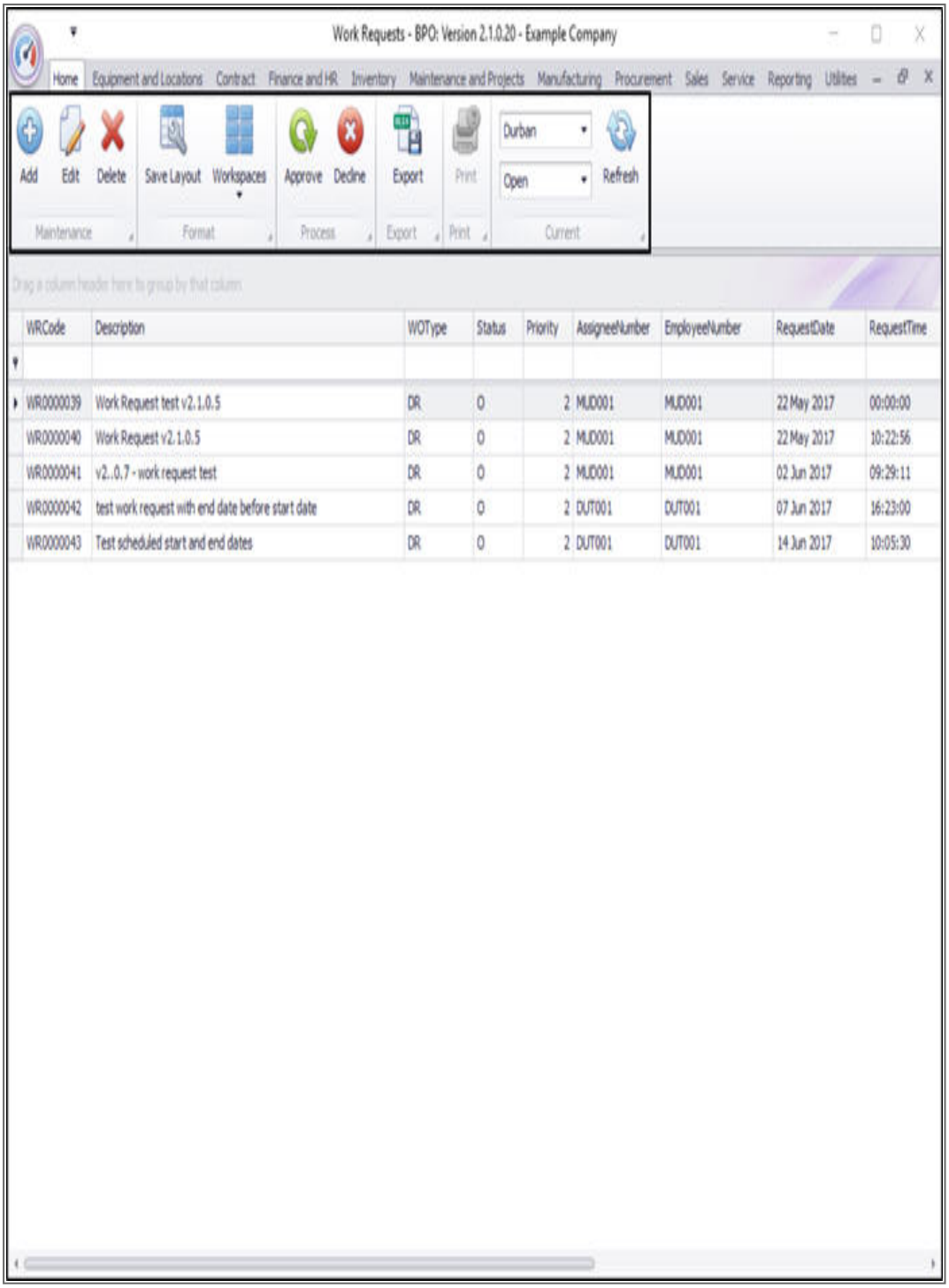

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TOOLBAR MENU

- You can also right click to in the data grid to display the ***Action Buttons toolbar*** in a drop-down menu.
- This menu does not contain all the action buttons displayed in the Action Buttons Toolbar and will vary according to whichever ribbon tab you are working in.
    - In this example, the drop-down menu contains only the ***Maintain*** and ***Process*** action buttons.

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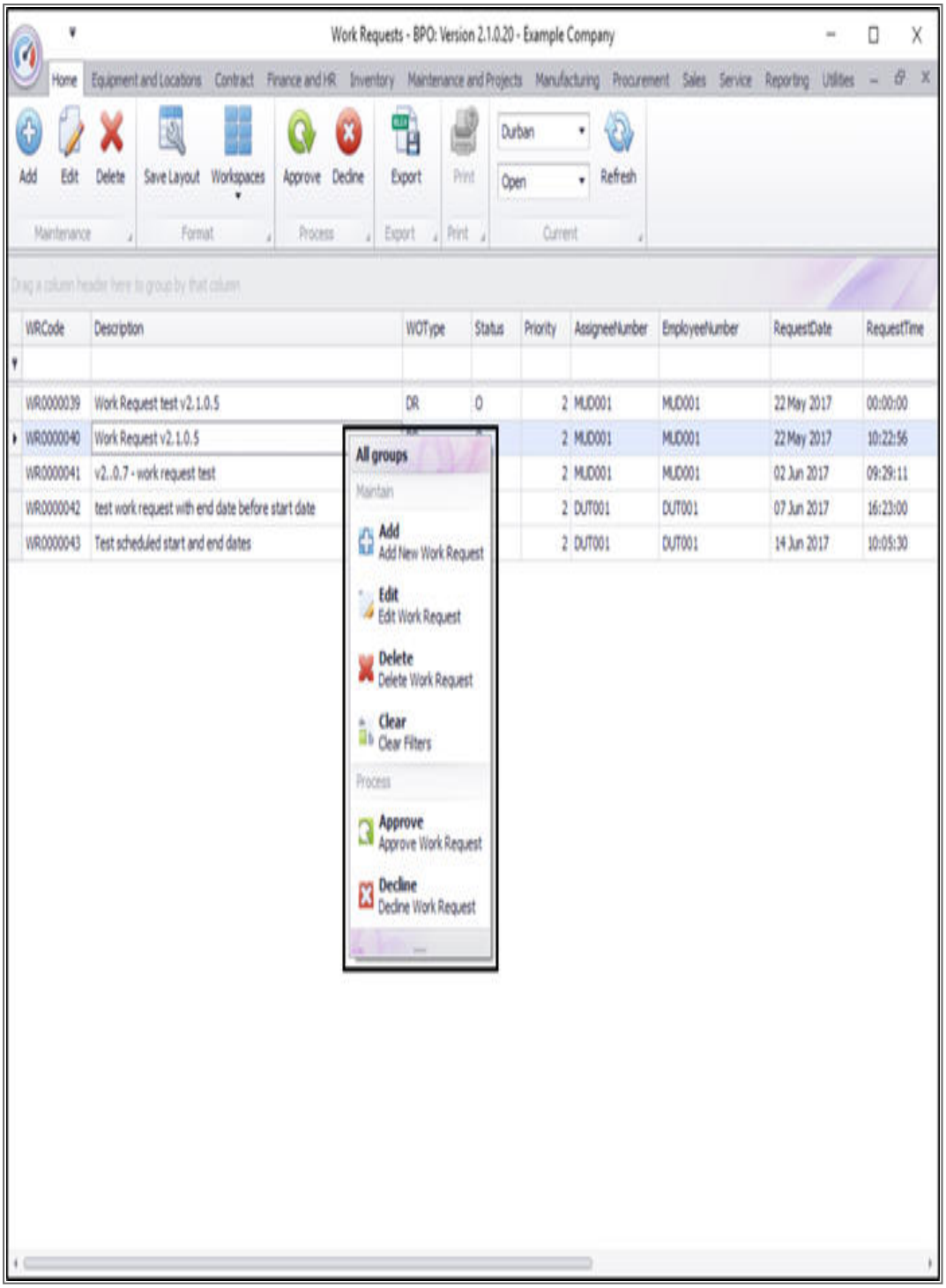

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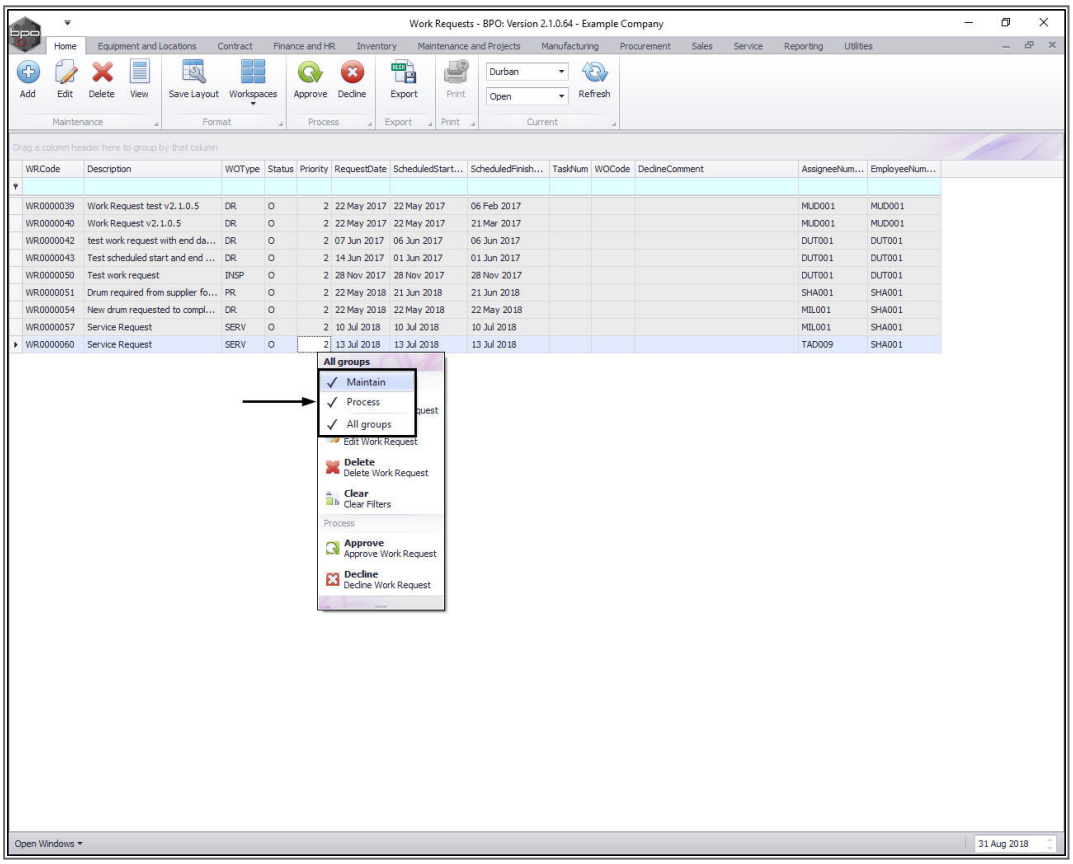
Customise Menu

- You can click on the ***title bar*** of this drop-down menu to display a list of the action button toolbar groups available to be displayed in this list.
    - In this example, you can select to view the ***Maintain*** action button, the ***Process*** action buttons or ***All Groups*** (all the available action buttons) in this menu.



- In this example, ***Process*** has been selected from the list (Maintain and All Groups has been un-ticked).
- When you have made your selections, click away from the menu to ***save*** the changes.

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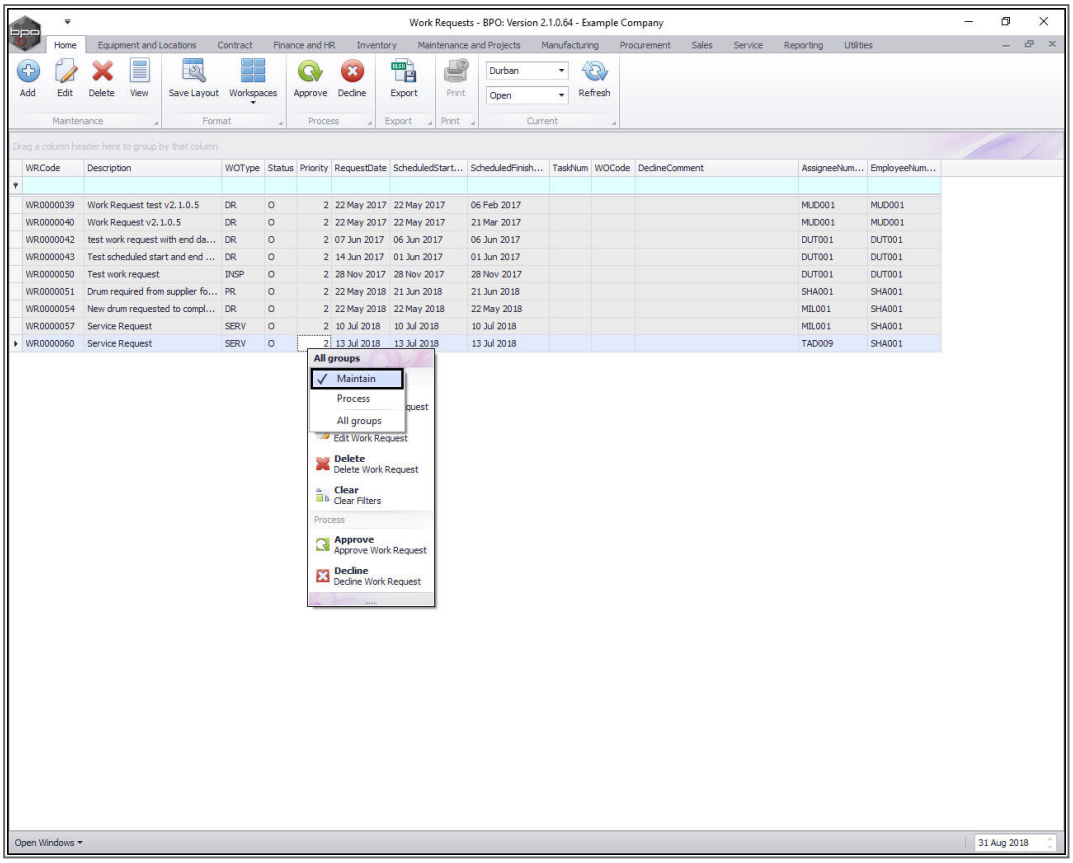

- The drop-down menu will now display the selection, in this case, only the ***Maintain*** action buttons.

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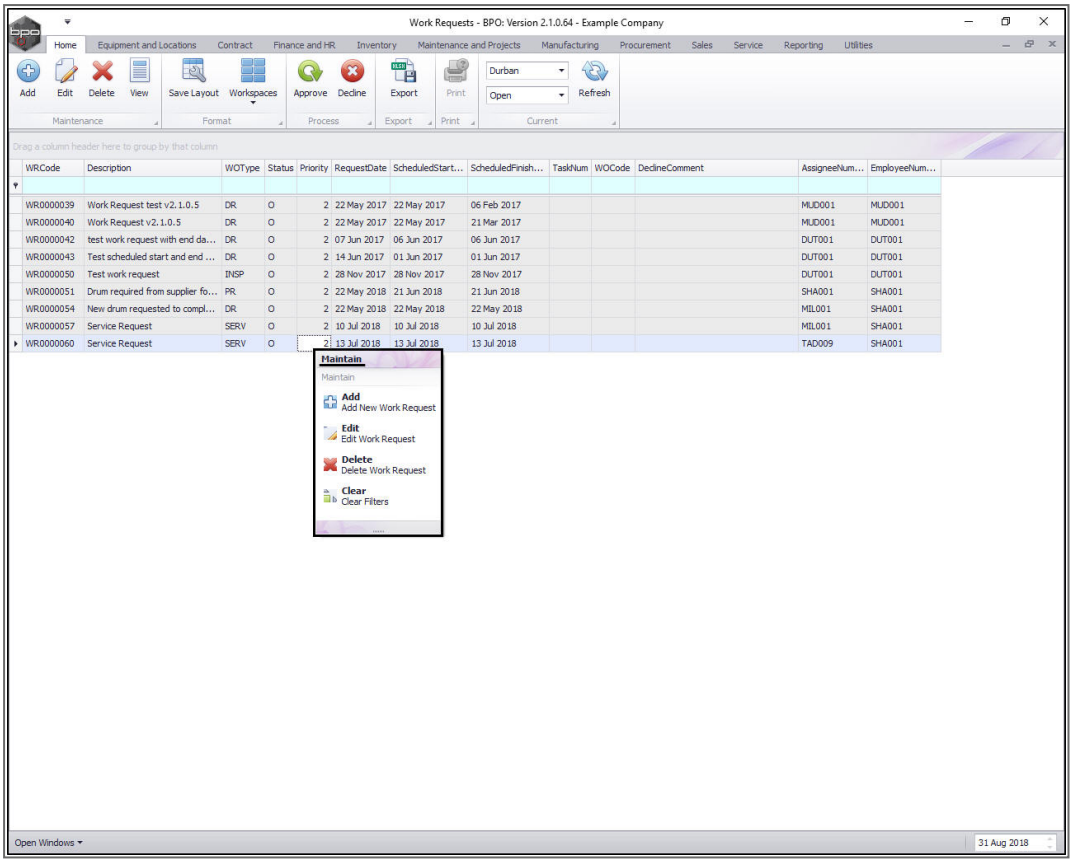

FUNCTIONS TILES

- Most Listing screens contain a ***Links*** panel that contains ***Functions*** and ***Processing*** tiles.
- Each tile will allow you to view ***data*** concerning a particular ***row*** that you have selected.

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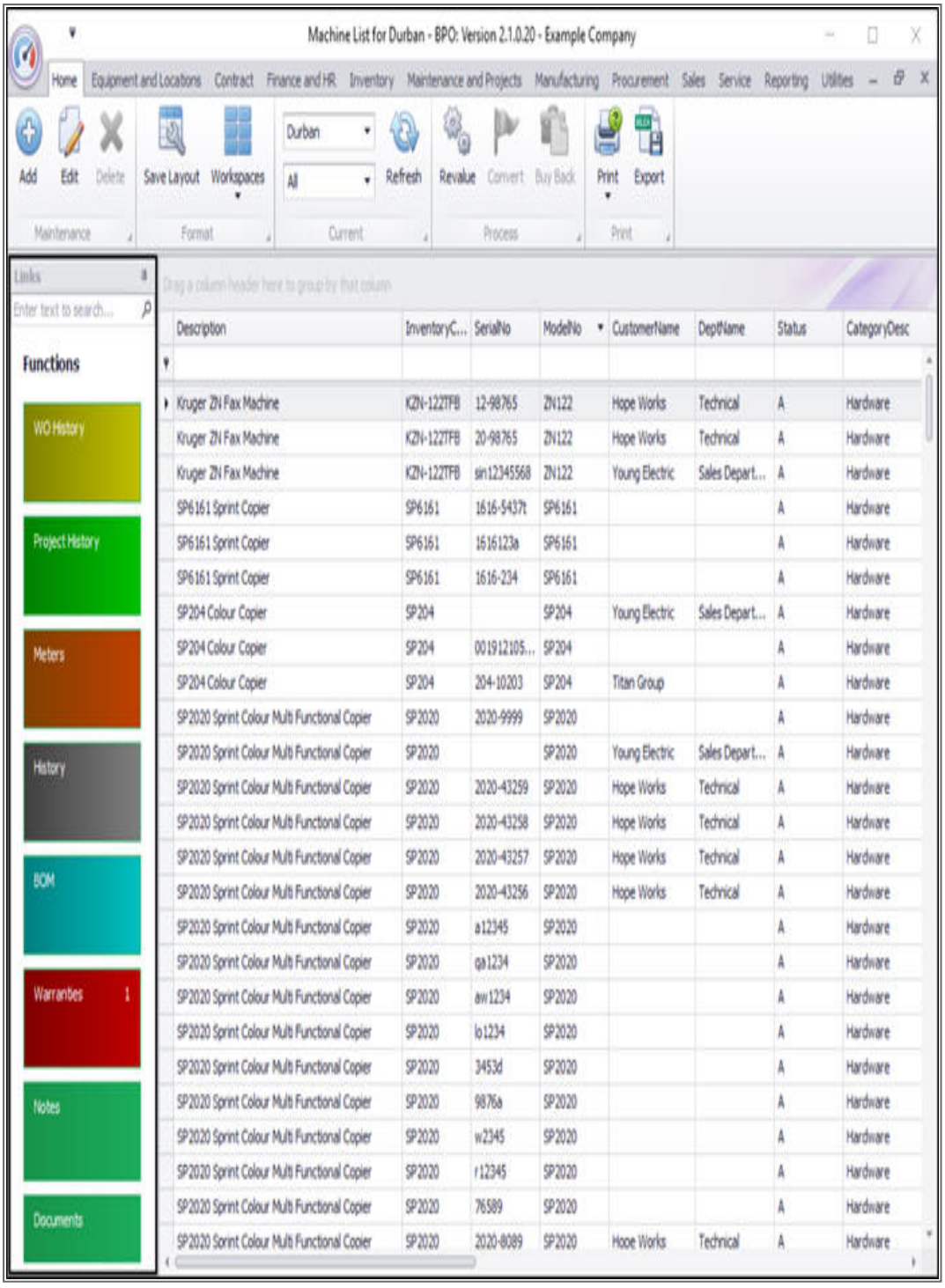

- Click anywhere in the panel and
  - *Either*, use the ***scroll button*** on your mouse

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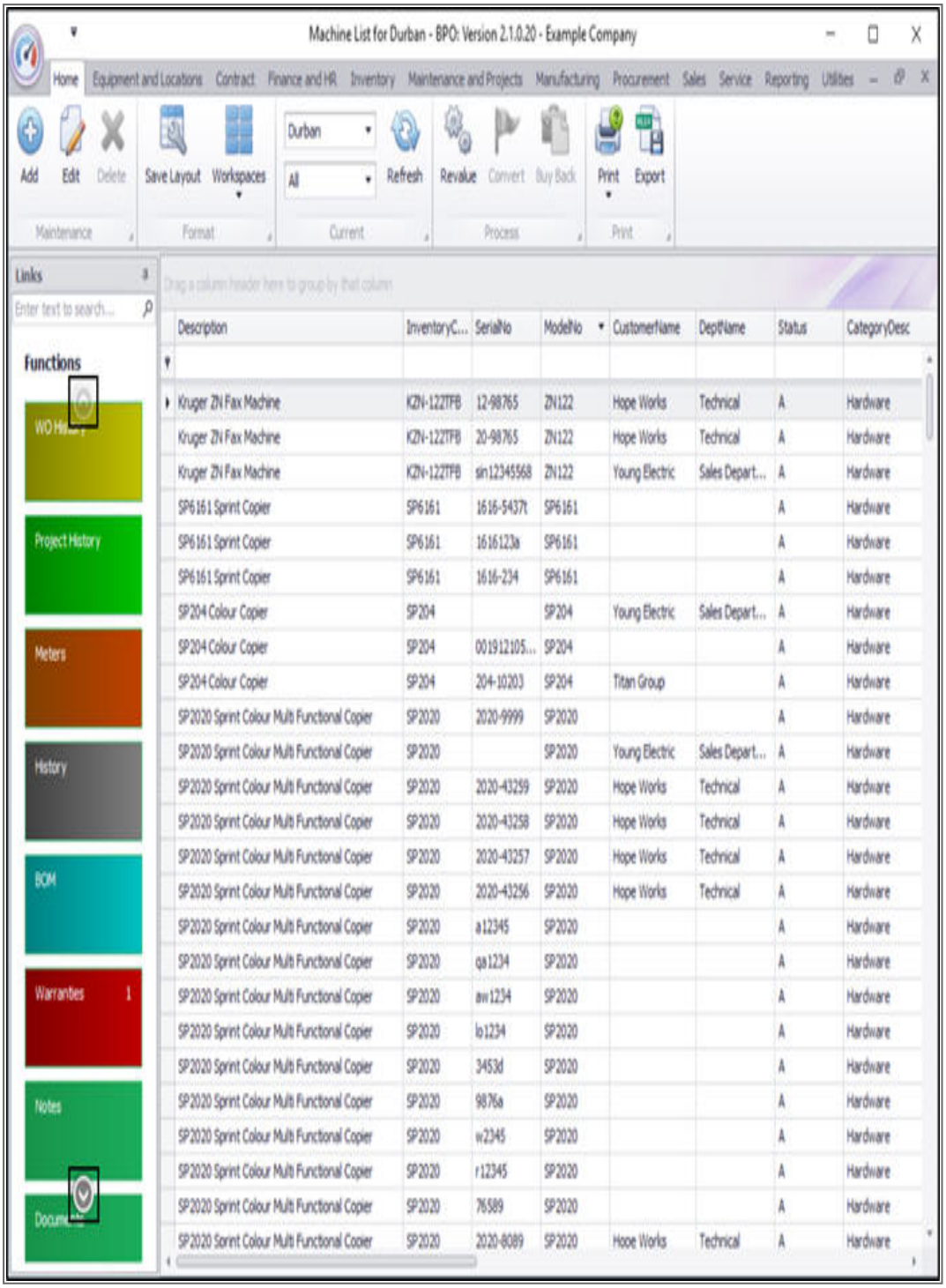
- *Or*, use the ***arrows*** that appear as you hover over the panel to scroll up and down to find your tile of choice.



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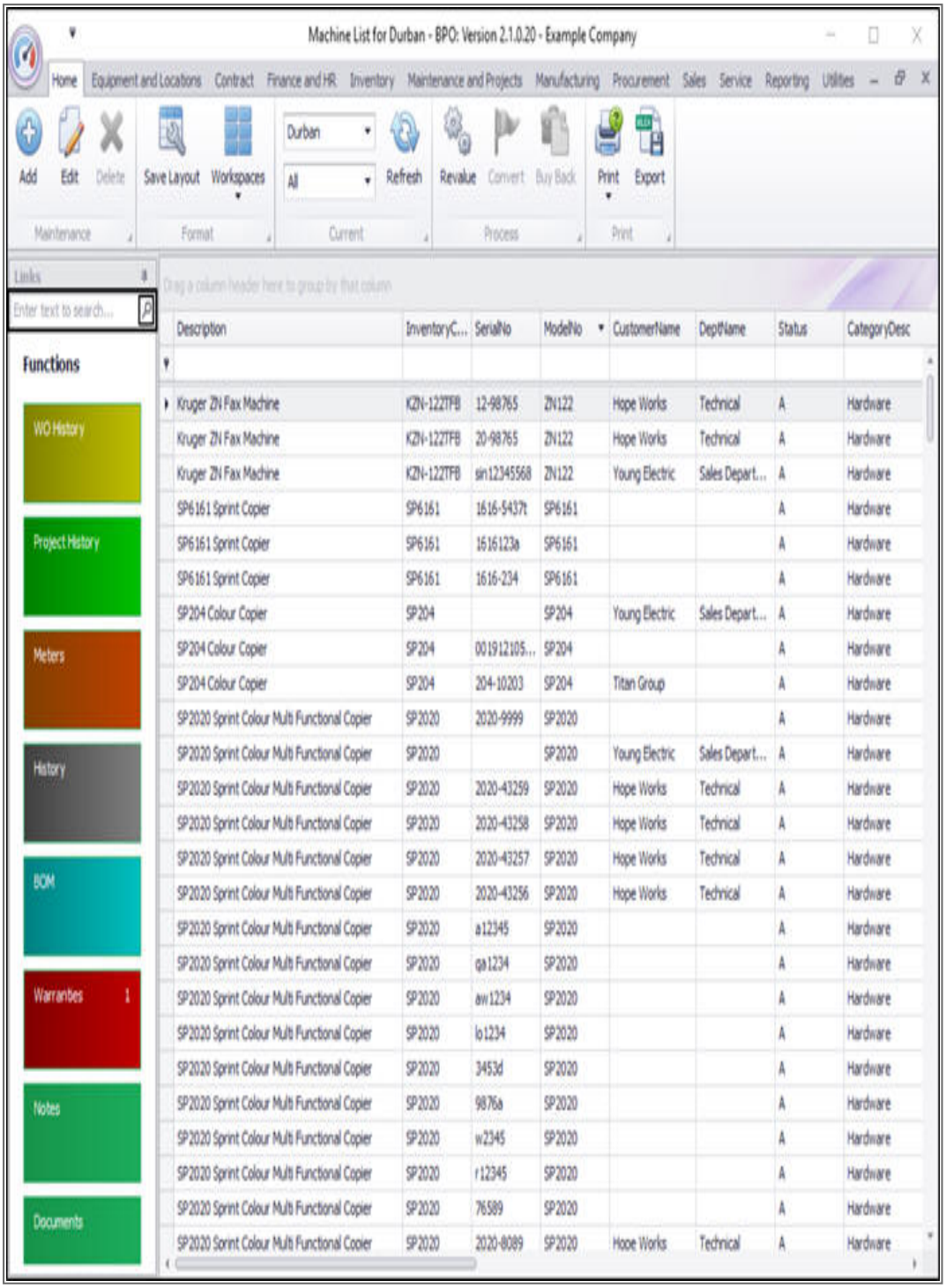
- You can also find your tile of choice by using the ***Search*** text box at the top of the ***Links*** panel.



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- In this search text box, type in the ***name*** of the Function tile that you are looking for.
- As you start typing the system will start searching.
- The ***Links*** panel will display your choice of tile.
    - In this image, we searched for the ***Depreciation*** tile.

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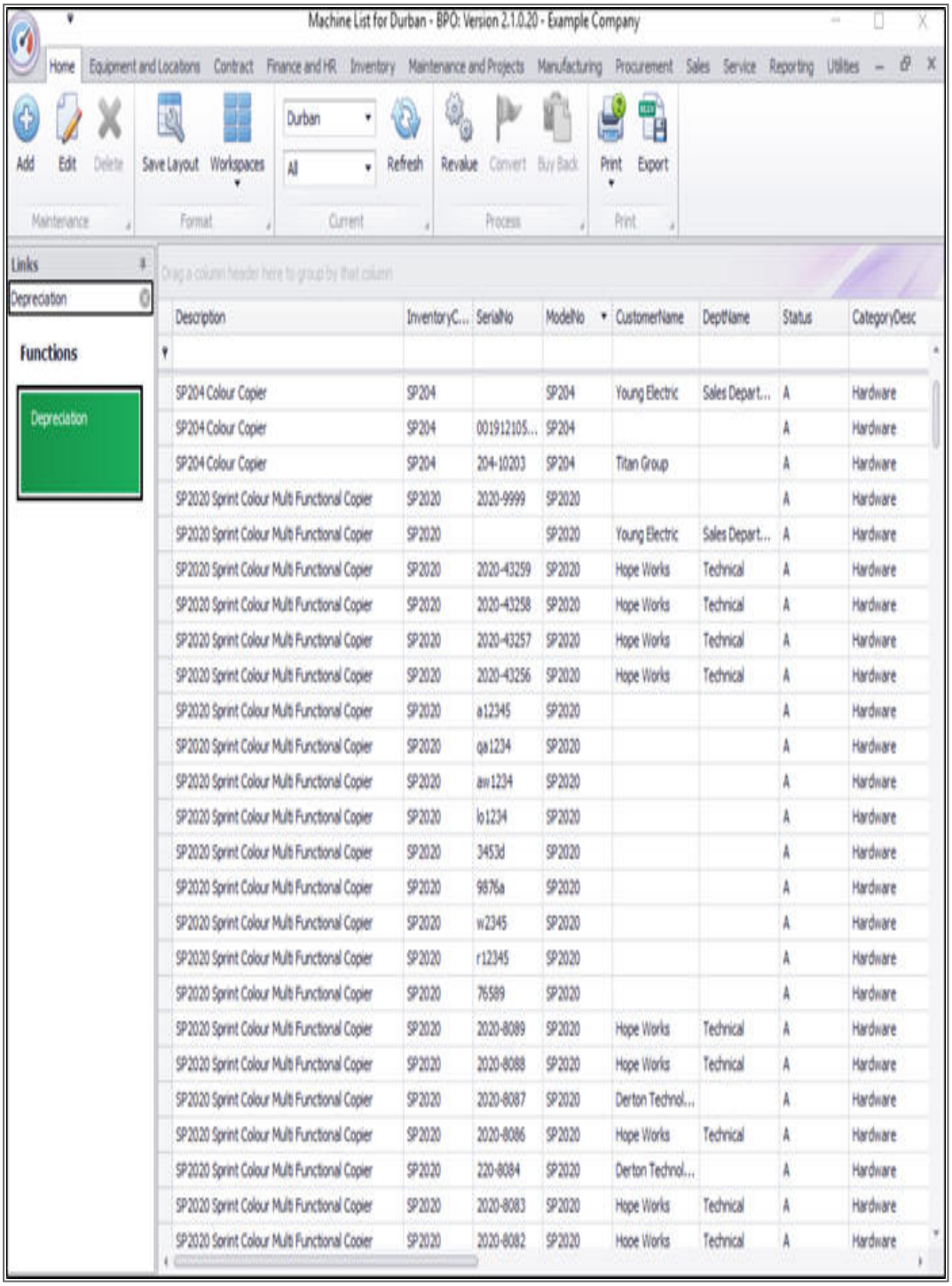

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DOCKING PANELS

- Panels can be ***docked*** (pinned) on the screen or ***undocked*** (un-pinned or hidden) according to your preference.
    - If a panel is ***docked*** on the screen the pin icon will be upright.
    - If a panel is ***undocked*** on the screen the pin icon will be ***on its side***.
- In this image, the panel is already docked (the pin is upright), click on the ***docking icon*** to hide the panel.

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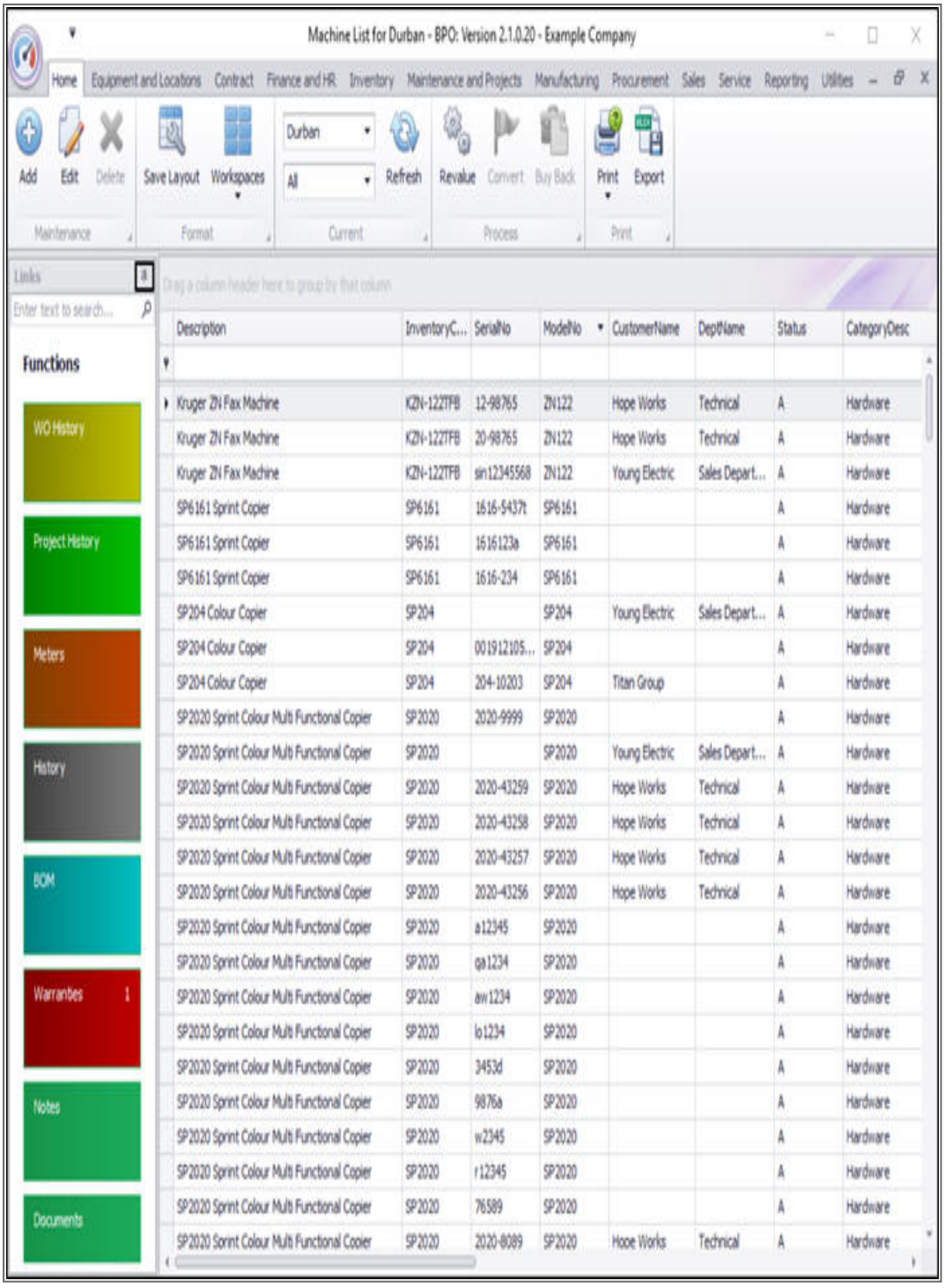

- The Links panel is now undocked, and a ***Links*** tab is now displayed on the left of the listing screen to show you that there is a hidden

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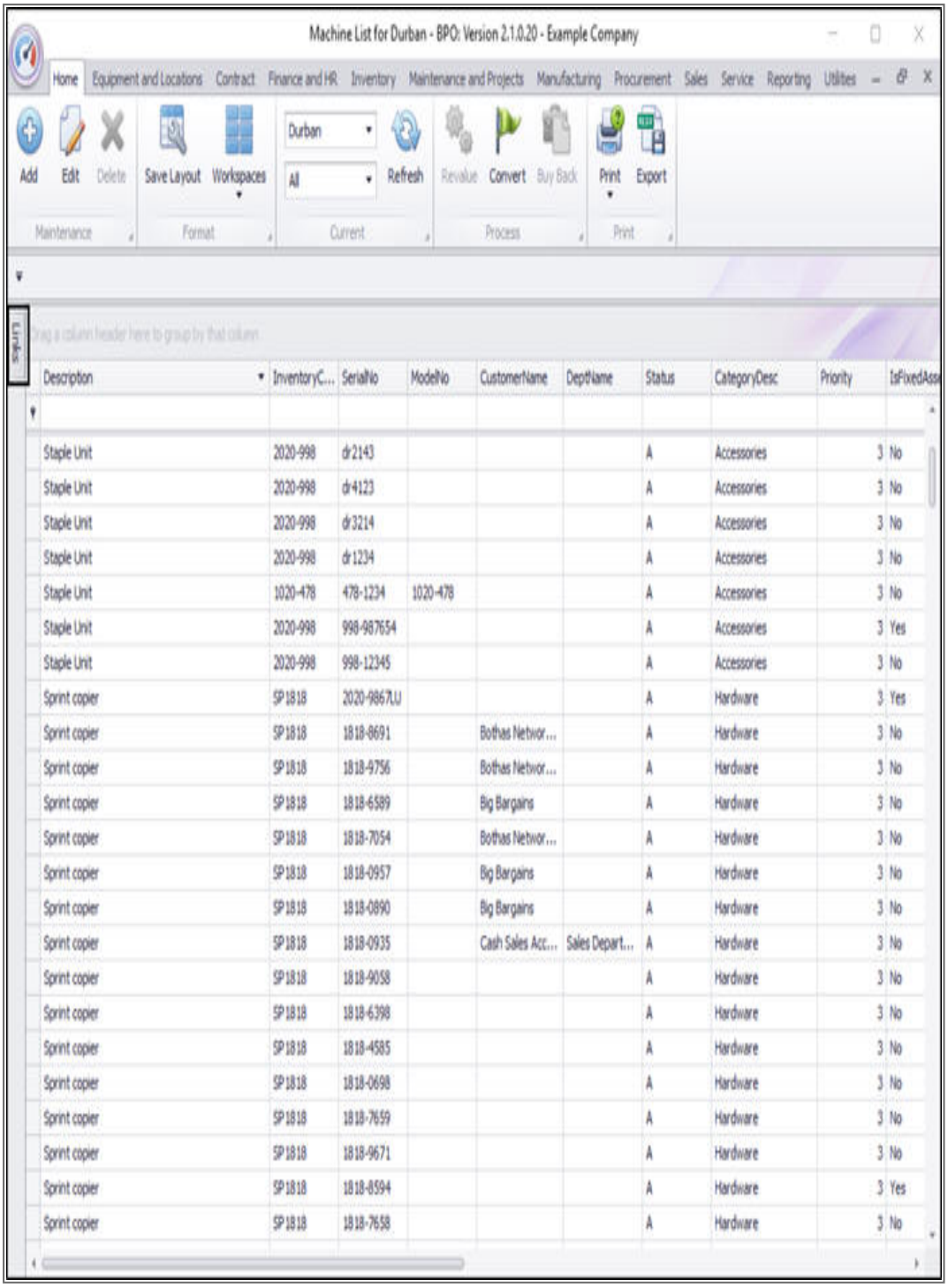
panel there.

- You can click on this Links tab to ***expand*** and ***dock*** the Links panel again at any time.



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THE SITE FILTER

- The ***Site Filter*** lets you select the ***site*** or ***company branch*** within which you wish to work. This is only available in relevant listing screens.

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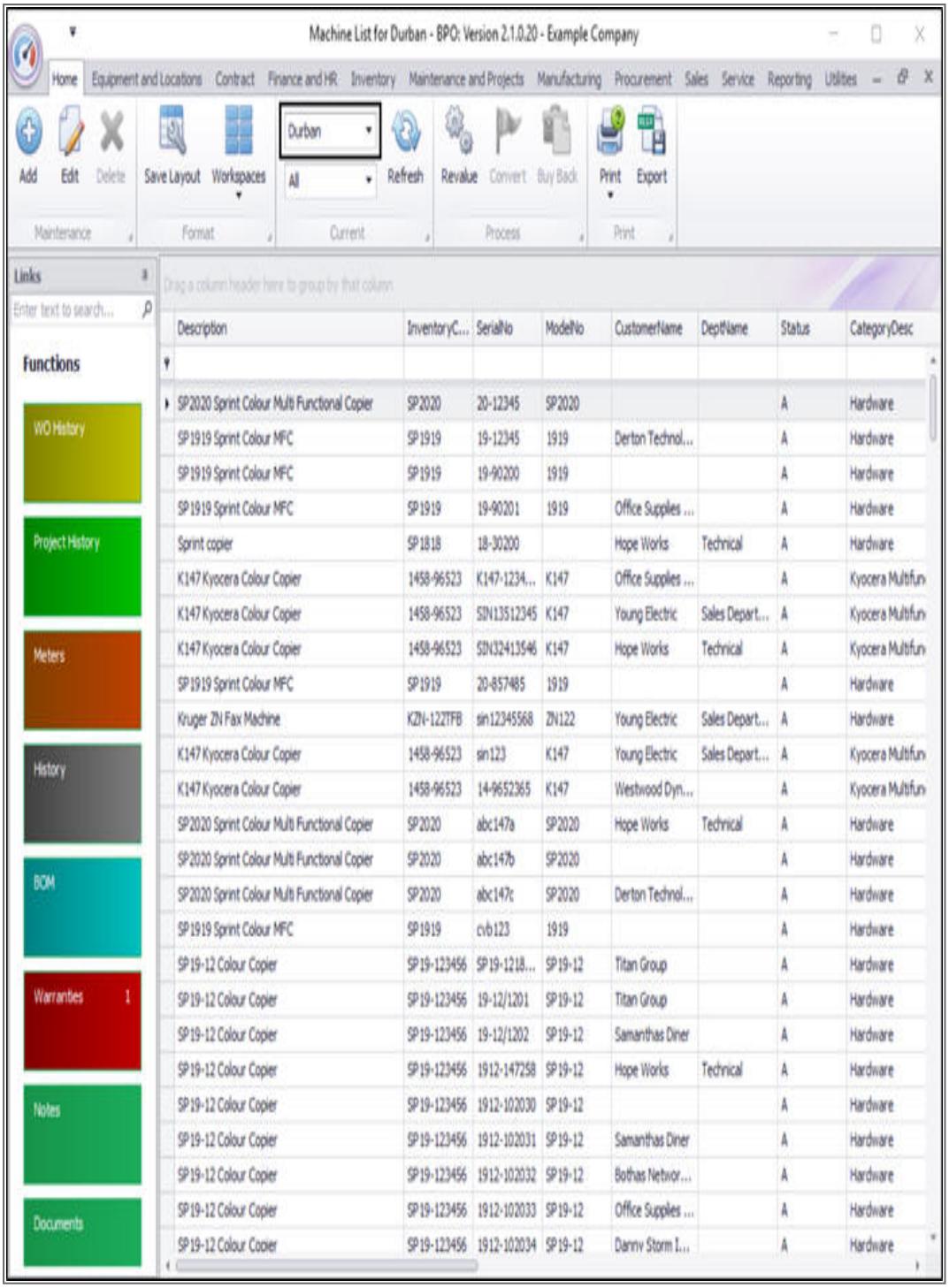

- Click on the ***drop-down arrow*** and select from the list, the site you wish to work in.

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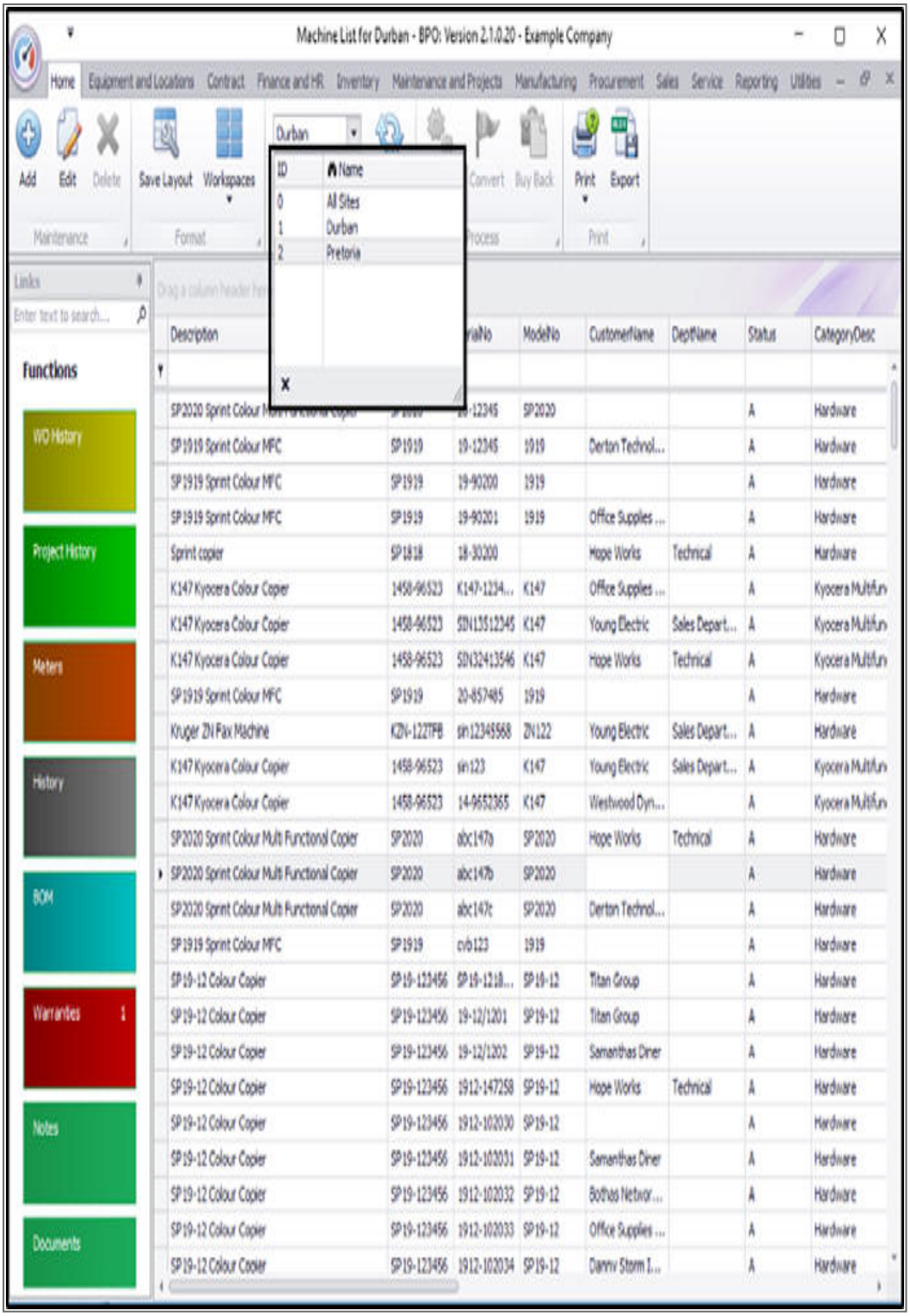

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THE STATUS FILTER

- The ***Status*** or ***Type Filter*** allows you to filter the information in the screen according to status / type. This is only available in some screens and its content depends on the screen that you are currently in. In this image we are searching for a particular status in the ***Asset Listing*** (or ***Machine List for Durban***) screen.
- Click on the ***drop-down arrow*** in the ***status*** field.

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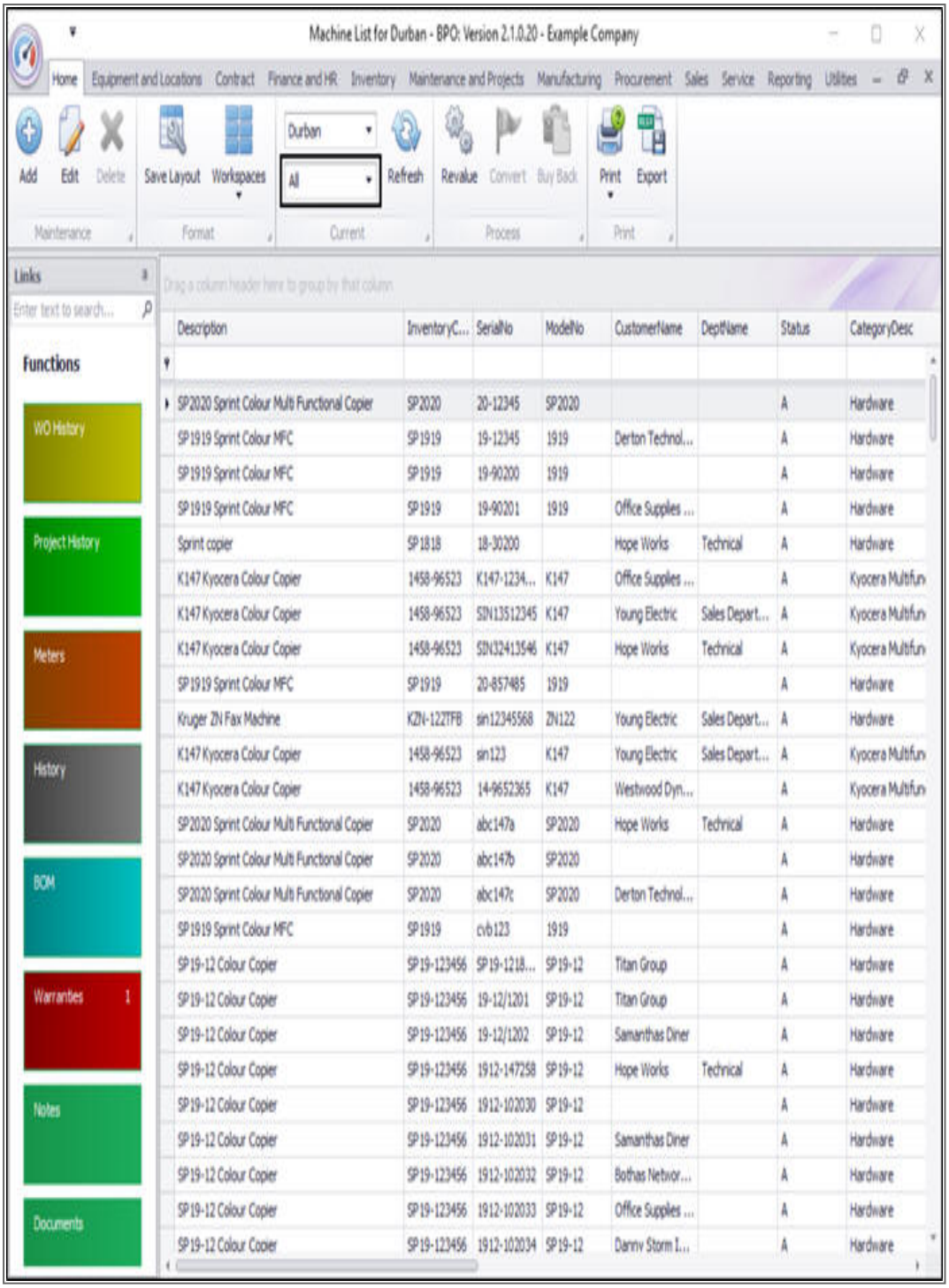

- The drop-down status ***Type*** and ***Description*** list will be relevant to the screen that is open.

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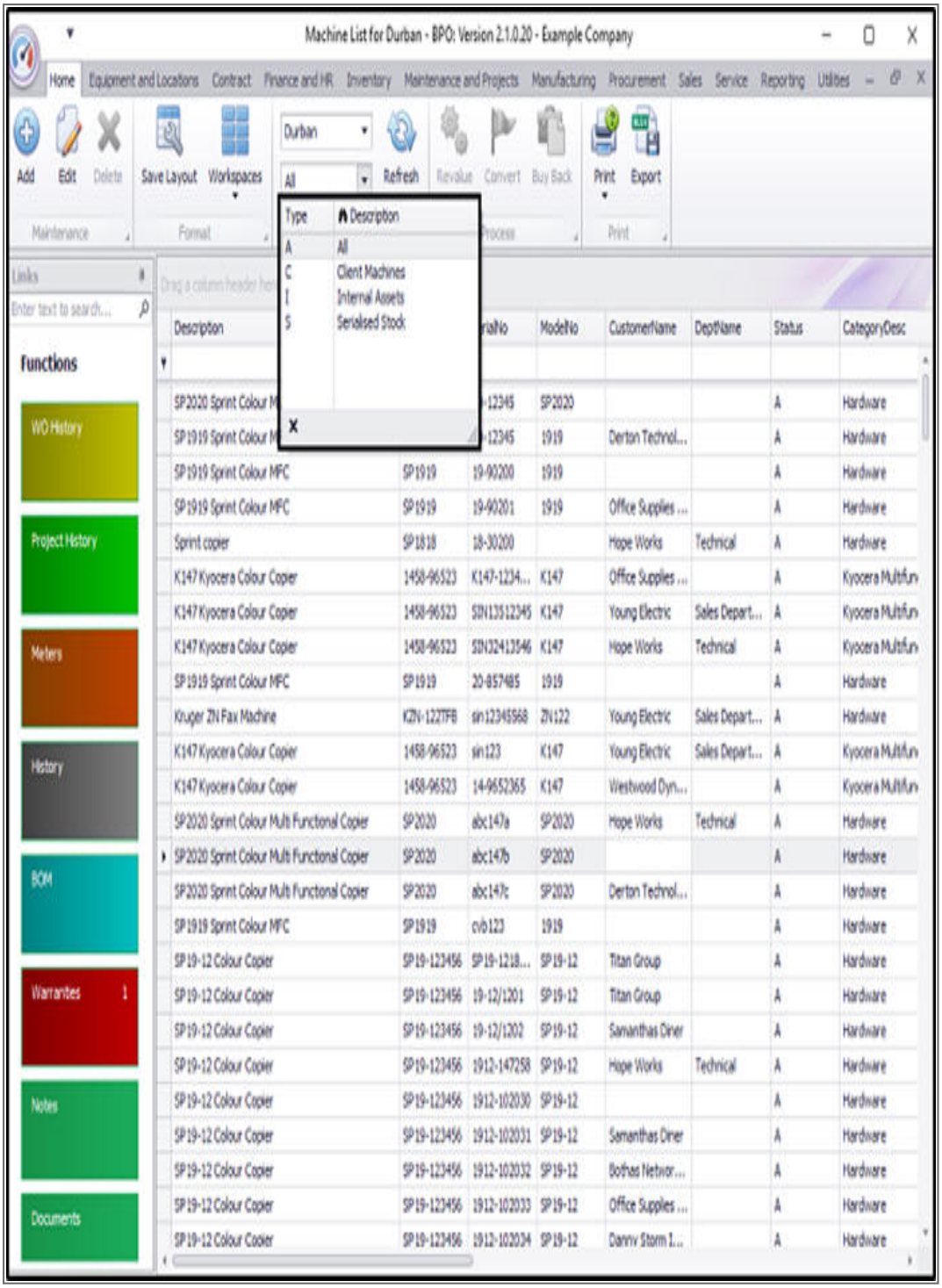

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