Discontinued PisaSales-Windows-Client

Win-Client - settings and login

The following topics are of particular interest for the technical administration of the PiSA-Windows-Clients:

+ Where are the configuration files of the PisaSales client?
+ Connection setup, login and registration dialog
+ Administering registration information in sets
+ Passwords
+ Automatic login
+ Automatic client update

The behavior of the PiSA-Windows-Client is influenced by the transfer of call parameters at the start as well as by settings in the client setup:

+ List of the client-call parameters
+ List of the client setup settings
+ List of the available client information

Where are the configuration files of the PisaSales client?

The configuration files of the PisaSales client among others store the current adjustments of lists, tabs and folders and so on.

Usually the PisaSales client is searching for the configuration files in this path:

%APPDATA%\PiSA\psccli

Note: *According to operating system and language %APPDATA% points to another directory.*

You can influence this as follows:

The client checks in the given sequence following keys in the registry if these contain the value "UserConfig"and if the content is reffering to an existing directory:

1. HKEY_CURRENT_USER\Software\Policies\PiSA\PiSA cubes Client
2. HKEY_LOCAL_MACHINE\Software\Policies\PiSA\PiSA cubes Client
3. HKEY_CURRENT_USER\Software\PiSA\PiSA cubes Client

If the client strikes it rich then it uses the reffered location for the configuration files. This can also be a network path. The logged in user of course must have write authorization on this path.

The first two entries are determined by policies in the Active Directory (AD) -Group/User- or Machine Policy), the third value simply in the registry.

Attention: *With 64 bit platforms (especiallyWindows 7!) it must be taken into consideration that Windows intends here specially paths for 32-bit application - e.g. "HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\PiSA\PiSA cubes client". If you operate on a 64-bit platform with "regedit", the value must be created under "Wow6432Node" analogously like in the example!*

Connection setup and login

The PiSA client tries to establish a socket connection with a running PisaSales server after the start. It needs following information for this:

+ Host name: The computer on which the PisaSales server is running
+ Port number: TCP port number of the PisaSales server or application name (Alias for port number)

The client transmits user name and password to the server after a successful connection setup:

+ The user name must be known to the server. That is the case if the user is registered as an internal staff member in PisaSales. Internal staffs members are automatically login users and are administered in the user administration with their login name and their Ident number (PiSA cubes-> system form User).
+ The password is optional. It can be omitted if the auto-login flag is placed for the login user in the user administration (Administration/Contacts/Internal staff).

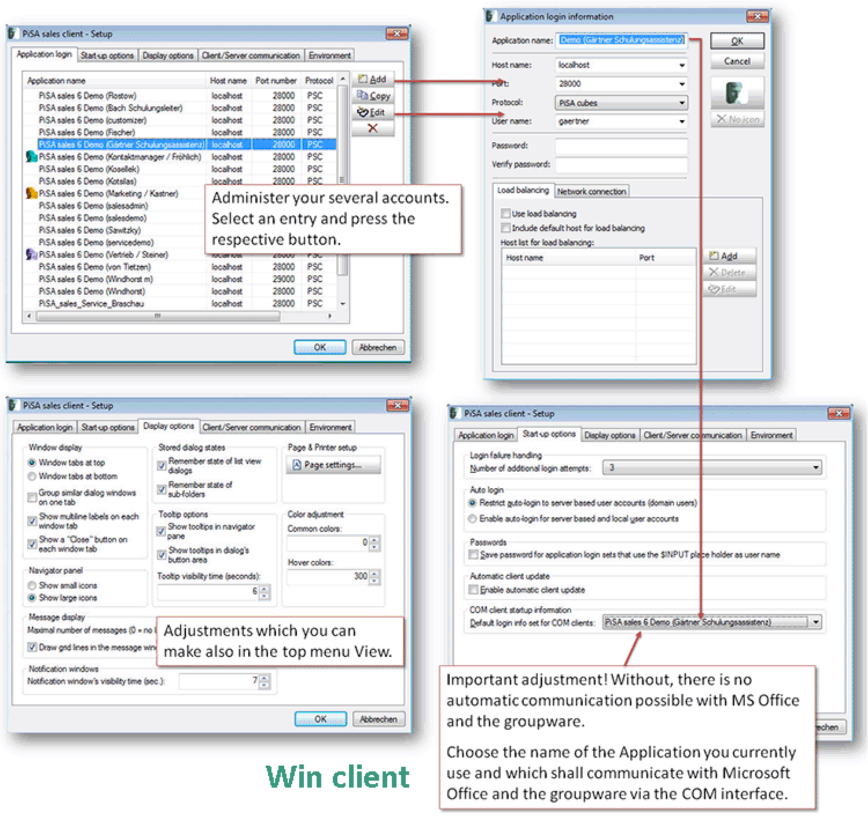


Figure 19-1: Setup start dialoq with login sets - Win-Client

Client server communication supports XVTP

The client server communication in the PisaSales version from 5.1 supports the XVTP (eXtended Virtual transfer Protocol). The protocol is able to arrange disturbed client / server connections again, so that one can go on working in the current session. Because connections susceptible to sturgeon are as a rule WAN connections (e.g., VPN about DSL), the client can also link login sets with VPN connections from the network administration of Windows and take into consideration their status now.

For the administration of the XVTP settings the Application login information dialogue was extended. The dialogue opens if one edits a login set. In the new sub tab Network connection the required parameters and, if required, a Dial-up-connection can be selected. The option Automatic restore of broken connections causes the client to try to recover the connection without further inquiry, if required.

Attention: *The use of XVTP presupposes a server which understands the protocol.*

Administer client configuration and registration information in sets

You can administer registration information in the Application Login folder of the client setup in sets for a comfortable login. Newly created or changed sets are saved with OK user-specific. Use the possibility to create sets in particular in scenarios when several PisaSales servers are distributed in the net. Your users do not have to know every single parameter for the login any longer. They only have to select a set in the Application field of the registration dialog, e.g., "PISASALES", and confirm with OK.

Attention: *Almost all PisaSales modules co-operate with office components (e.g., with MS Outlook). PisaSales must be launched via a set for a perfect collaboration. You find more information regarding this topic in the paragraph Office coupling-> login sets and Groupware integration. More Information in the Admin chapter section* -> Groupware coupling

Registration dialog

You transfer information for a connection setup and login either in the command line or in the registration dialog to the client. If no automatic login is defined, the registration dialog opens. It displays the parameters transferred in the command line. Missing parameters are complemented from user-specific set. The login user can then check the registration information and change it if required. The client saves the values that were administered last given as default values user-specific. They form the top selection during the next login.

Configuration assistant for administrators

The configuration assistant can be opened for the client with the right mouse button in the Windows control panel (Uninstall programs or change). It serves the management of personal client configurations (calibration sets) and allows:

+ A copy of global sets for the creation of personal sets
+ Labeling of personal sets as a standard sets
+ Labeling of personal sets as COM sets

The standard-connection parameters are requested during the client installation. This data is saved in the following sets:

If the installation took place for all users:

+ PISASALES-set: globally.
+ PISASALESADMIN-set: locally for the user who carried out the installation.

If the installation took place for the local user:

+ PISASALES-set: locally for the user who carried out the installation.
+ PISASALESADMIN-set: locally for the user who carried out the installation.

The client can only read sets from the personal user-specific set. Therefore there must be tool, which every Windows registration user can use to generate personal sets.

Note: *If the administrator makes later more global sets available, they should receive other names. Thereby exists no identical set in the personal set list of the final user. The new set is applied to his personal list when the client is started by the final user.*
The set whose server should be used by the office components must be selected as a COM set, meaning the set, which is just being used. The communication with the office components (e.g., with MS Outlook) is now assured.

Passwords and auto logins

See also: *Please inform yourself about this topic in the Admin chapter section* -> Administer internal users

Automatic login

You can automate the login process with the option-l and a complete surrender of the registration information (-a or -h,-p,-u) in the command line.

The PisaSales client checks after the start at first whether the transferred user name corresponds with the current system user name (current account) on the client computer. The validation of the user account by the client is influenced by the auto login setting in the client setup:

+ Only domain user admitted for automatic login - or
+ Domain and local user admitted for automatic login.

The client transmits his information then to the server. The server determines with the help of the auto-login flag in the user administration (navigation bar PiSA cubes-> User), whether a server-sided password check is necessary for the user or not. If all requirements are fulfilled (correct password entered or auto-login flag = ON), the registration dialog is inhibited.

Client call parameters

All options and parameters which you can transfer to the psa_cli.exe at the start are listed below. Missing values are requested in the registration dialog.

Parameter	Meaning
-a Application	Name of the application, for example "PISASALES". Uses the registration information saved in a homonymus set for the connection setup with a current PisaSales server.
-h Host	ame of the computer on which the server service is installed, e.g. "psa server". If server and client are installed on the same computer, the name "localhost" can be used.
-p Port	TCP port number, e.g., "28000". Numerical values between 0... 65535 are interpreted as a port number.
-u User	Name of the user. The user must be registered in the PiSA cubes user administration (PiSA cubes-> system form User). This is the case if the user was registered as an internal staff member in PisaSales.
-l	Autologin. Tries to launch the client automatically, using the registration information transferred in -a,-h,-p, or -u to inhibit i.e. the registration dialog.
-c	Deletes all session-specific information of the user, e.g. column width. Registration information is not deleted.
-s	Inhibits the startup dialog and immediately opens the client setup.
-f	Reads client settings from a transferred configuration file. With the exception of-l and-c all options transferred in the command line are ignored. The default COM login set from a configuration file is only used if a user-specific entry with a valid value for the configuration file exists. ***Note:*** *The command line option "-f" serves administrators to exclusively test different configuration files. See also document: " PisaSales 5 central client configurations (distribution) "*

Note: *String values with hyphen must be written in quotes, e.g. "-h" localhost.*

Client-Setup

Client settings are carried out in the client setup dialog (registration dialog-> Setup). All settings are automatically registered user-specific after you click OK and evaluated by the next session.

Tab	Details
Display options	Controls the representation of navigators and dialogs in the client application window, as well as the saving of client states user-specific after the ending of a session. + Window display: Main dialog tab top or bottom, button Close in every main form or central on the top right in the top menu + Navigator panel: small or big icons, admit tool tips + Dialog display: admit tool tips to the function bar + Stored dialog states: 1. Note user-specific which column widths and column heights were last used in the lists, otherwise use always default settings (hot key [Ctrl+Alt+R] resets the to default values). 2. Note user-specific which subdialog (tab) was maximised last and which one was last active. + Tooltip options View of the tool tips in the navigator and in the masks + Color adjustment With it you can try to adapt the global brightness to improve the display on your monitor. The number values are deci-percent (100 = 10%) and cann be set as negative entry too. E.g. Common colors = -100 conforms 10% darker. E.g. Hover colors = 300 conforems 30% brighter, as the background color of a colored field.
Start-up options	Controls the treatment of login errors, automatic login, automatic client update and the COM registration. + Number of incorrect inputs in the start dialogue, with which the starting dialogue appears again (incorrect input of the connecting data). But the number of false inputs of username and password may not be greater than the number of incorrect logins defined in the server max 3), then the user is restricted from system. + Auto login: If the user name of the application = the system user name, then an automatic login is allowed for: 1. Domain-User, 2. Domain-User and local users + Automatic client update: Activated -> automatic Client-Update via the PisaSales Server (only for users with administrator rights for the workstation) + COM Client startup information: Selection, for which set COM components are activated.
Application login	Set-list. Administers the connection parameters host name, port number, user name and password in the sets, which are identified by arbitrary application names. The sets are offered for a selection in the field Application of the registration dialog.

Tab	Details
Environment (Entries also via the form My data> Configuration/Groupware)	Entry of specific values/parameters for necessary environment components, e.g., values of COM components for Microsoft Outlook. For example: **OUT_ACT**: Controls that with the sending of an e-mail from Outlook the file GIDFILE is searched. GIDFILE is a system-internal information which is necessary for the identification of the e-mail during the check in. If the value is y (default), e-mails that were created in Outlook are checked in after a further inquiry.

Note: **Aliases for port numbers are maintained in the application list of the client setup, but they can also be administered centrally by a TCP service (depositable in the EPC service file).*

Client information -Win-Client

You receive information about the client in the registration dialog or in the client application window via the Windows-system menu-> PisaSales (mouse click on the icon left in the dialog title) About PisaSales.

Among the rest, these information assist the PisaSales support to may quick diagnose your system status.

Some of the commands open the Windows explorer (file manager) and thus permit the access to paths which are used for the respective PisaSales session.

Attention: *While a session runs, nothing should be deleted in these directories. However, you can use the explorer to clear up specifically after terminating all clients. The TEMP directory of the current session should be cleared off as a rule automatically.*

Client and server administration Win client

Note: *The information first and foremost concerning the administration of the Windows client (Win-Client)!*

The administrator must not only setup and customize, but also administer the system technically. Important is here the administering of the server and the clients as well as to warrant the functionality of different interfaces. PisaSales is a licensed software, and depending on which license was acquired, the licensing must be updated for expansions, upgrades and further run time licenses.

Especially important for the technical administration of the PisaSales server are the following topics:

+ Server-call parameters
+ Server-start types (as a service or via the menu icon))
+ Server administration (via server window or system monitor)

Server administration

-Via server window or client system monitor-

You administer a PisaSales server, depending on the start type, either directly in the server computer via the server window, or from the PisaSales Windows client via the system monitor (navigation bar PiSA cubes-> Monitor).

+ Server started with the menu icon: Administration via server window (client not necessary) or via client system monitor
+ Server started as a service: Administration only possible via client system monitor

Both tools inform you comprehensively about the current server and database parameters, logins, logouts, current sessions and active licenses. You can observe the server cache and delete single objects straight from the cache as well as send messages to the logged in users.

Tabs in the system monitor (Tabs in the server window)	Details
Application/Database (application)	Displays the current server parameters, the server states and the database-connection parameters.
Logbook (message log)	Registers all logins and logouts. You can delete the content of the logbook (function only available in the server window)
Sessions (processes)	Displays all open sessions. You can mark and stop sessions.
Licences (licenses)	Displays all currently used licences. You are able to load license data. The license information must be available in form of a license file. The file has to be located in the PisaSales server directory.
Cache (global cache)	Displays all objects saved in the server cache. You can limit the display of objects of a certain type, mark objects and delete them from the cache with filters.

Tabs in the system monitor (Tabs in the server window)	Details
Messages	You can send messages to all logged in users (function only available in the system form Monitor). Only after a server-relevant user operation is the message displayed in the destination client.

Server-call parameters

The call string of the PisaSales server has the following form after the installation (example):

"C:\Programme\PiSA\java\bin\java.exe -Xmx256M -jar psa300.jar Psc -ddb jdbc:oracle:thin:@psa-server:1521:ora817 -udb psa30x -pdb psa30x -tsp psa_data -isp psa_index -bsp psa_blob -por 28000 -log logfile"

You have to close the service for potential modifications. All command line options or parameters are listed and briefly explained in the following table.

Parameter	Meaning
java.exe -Xmx256M -jar psa300.jar Psc	Launches the Java interpreter and executes the PisaSales-Server-program.
-tsp tablespace	Database tablespace, with additional -isp and-bsp can index spaces and BLOB-Space names deviating from the tablespace name be transferred. If-isp and-bsp are absent, -tsp is used for all contents. If an indicated tablespace does not exist, you receive an error message.
-isp indexspace	Index-space
-bsp blobspace	BLOB-space
-ddb jdbc:oracle:thin:@psa-server:1521:ora817	Database specification, consisting of Java-database driver (here for oracle) and the connection parameters host name, port name and oracle SID
-udb db-username	Name of the database user.
-pdb password	Password of the database user.
-por port	Port number for the communication based on sockets between PisaSales server and PiSA client (recommendation 28000... 30000).
-log logfile	Creates a protocol file.
-lic licence-file	Loading of licences
-loa install bzw. loaderfile.xml	Loading of the PisaSales-Repository or other arbitrary data provided in an XML file.

Providing the server-start parameters in a properties file

You can summarize all start parameters in a properties file. Thus you avoid the input of the rather extensive parameter clause in the command line. A properties file is accessed with the option -f. The file has normally the name server.properties. The call string looks as follows (example):

```
C:\Programme\PiSA\java\bin\java.exe -Xmx256M -jar psc600.jar -f server.properties
```

All required start parameters are listed in the following form in the properties file. Comments are prefixed with #. Thus you can hide, e.g., parameters that are not required. Note that start parameters in the call string have precedence compared with the properties.

```
#database name
psc.ddb=jdbc:oracle:thin:@192.168.100.42:1521:pisadb9i

#database user
psc.udb=pscuser

#database password
psc.pdb=pscpass

#database tablespace
psc.tsp=psc_data

#database indexspace
psc.isp=psc_index

#database blobspace
psc.bsp=psc_blob

#port number
psc.por=16043

#server visibility
psc.vis=true

#repository installation
#psc.loa=install

#application title
psc.tit=PiSA cubes

#additional job setup
#psa.job.grp=GLOBAL
#psa.job.grp=GLOBAL,SINGLE
```

Server-start types

-as a service or via a menu icon-

You determined the start type of the server (service, via menu icon or both) during the installation.

The configuration file of the service is wrapper.conf in ... / PiSA/server/psa31x/conf. The service must be terminated for modifications of the configuration file. Important settings in the configuration file are:

+ Path to the Java VM: wrapper.java.command=C:/Programme/PiSA/java/bin/java.exe

+ Path to the PisaSales Server: wrapper.java.classpath.1=psa31x.jar
+ Path to the configuration and license file of the report tool Windward: wrapper.java.additional.1="-WindwardReports.properties.filename=C:/Programme/PiSA/server/psa31x/conf/WindwardReports.properties"
+ Maximum size of the heap memory for Java VM: wrapper.java.maxmemory=256
+ Log-File: wrapper.logfile=C:/TEMP/psa31x/service.log

If the database is not available yet, the service might not be able to start, e.g., after the reboot of a computer on which the database and the PisaSales server are installed.

If both start types were selected, the server can only be launched manually with the menu icon, if the server service was terminated before.

Primary and secondary print server -for your information only-

The print server ensures the treatment of concurrent print inquiries of several applications in the report tool Windward. That guarantees that the print orders in the server are processed, while the completed documents can be printed at the same time.

Windward server configuration in the properties file

The printserver is automatically installed on the server computer (localhost), if no printserver exists there. If another host name is stated, the setup program assumes that the print server to be used is already installed there. There is no print server installation in this case.

The given host name is used to place the primary print server entry in the properties file.

psa.rpt.rmt.srv = psa.rpt.rmi.PsaRmiRpt;rmi://machinename/WwdSrv

If a local print server is installed on a mobile system (primary print server entry existing), the mobile system should know, after connection with the company network, that there is a second print server alternatively available. Set the secondary print server entry (backup print server) in the properties file manually after the installation in addition to primary print server entries:

psa.rpt.rmt.bck.srv = psa.rpt.rmi.PsaRmiRpt;rmi://Machinename/WwdSrv

Another possibility would be to disclose the server with the resource variable PSC_RPT_RMT_BCK_SRV.

Conflicts with two running printservers

Two running print server in the network may lead to conflicts. Therefore you have to deactivate the print server of the mobile system if you connect a mobile system to the company's network. Set the start type of the print server service to "manual" and start the print server manually only if required (en-route).

The backup server can be indicated in the property file with the Property psc.rpt.rmt.bck.srv. The next possibility is to disclose the server with the resource variable PSC_RPT_RMT_BCK_SRV.

Customizing of the color schema and corporate design - only Win-Client

You can adapt the appearance of the PisaSales Win-Client quickly to the corporate design of your company. You only have to exchange some graphic resources in the BLOB table or set server environment variables differently to do this.

From PisaSales version 6.1 now you can beside changing of standard elements (e.g. you company's logo) fit the color schema of the user interface too.

Attention: *This can be changed only by developer users (member of group 41). The changes are then binding for all users (WORLD). To a certain extent, the appearance of the Web client can also be adjusted. Especially for questionnaires you can use a color scheme (see chapter "PisaSales questionnaire module"). Please contact your PisaSales project engineer if you want to change the color scheme of the PisaSales Web client.*

Modify color schema

The changes you deal in the menu Administration/Tools/Color scheme.

With the help of these administrative tools different color schemes are administered . PisaSales standard currently offers three schemata. With it also is guaranteed that a usual color schema from former PisaSales versions is available furthermore.

The administrator can create further color schema.

Attention: *Here variables become modified which are set basically for the group WORLD, so for all users.*

You can create a new color schema. The corresponding variables and the corresponding BLOBs belong to a color schema. The record must have an unique identifier.

Every schema consists of variable definitions (PSC_CLR _ ...) which define as a rule the colors.

Provide standard variables

With the function Insert all variables the list Variables with the necessary standard variables will be preoccupied. Then for the corresponding variable the color value is selected. You find the color values also in the PiSA cubes list Resources register Colors.

BLOBs

To a color schema also selected BLOBs belong which can be traded in the list BLOBs of the color schema management. Various decorative elements of the face or, e.g., the colored areas for search entries in the fulltext EUREKA search belong to the BLOBs.

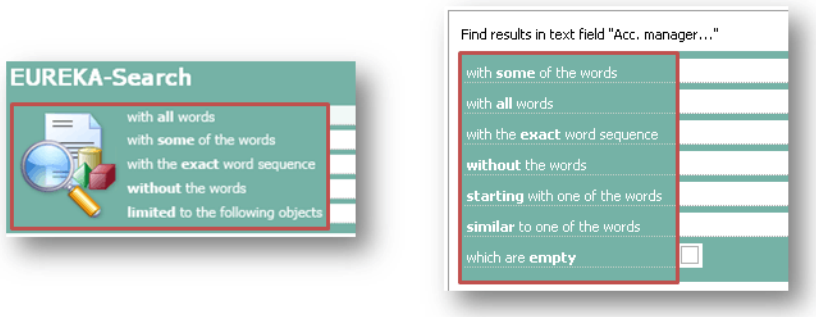


Figure 19-2: BLOB in the form EUREKA searcxh or in the filter form

Provide of standard BLOBs

With the function Insert all BLOBs the list BLOBs will be preallocated with the necessary standard BLOBs. You can simply look at the respective BLOB, when you open the hyperlink in the field Name of the BLOB list.

Tip

You must copy the respective BLOB at first in the PiSA cubes list Resources and save with an own name (best attache an abbreviation). The new BLOB is to be exported and to change locally with a respective drawing program. Import the changed picture then for the new BLOB. Aftre this the name of the new BLOB can be selected in the color schema management as Value of the standard BLOB.

Attention: *Except colors content and dimensioning of the BLOB should not be changed, because they are partially bound to field positions of the affected mask.*

If variables and BLOBs are adapted for own color schema, you should provide an example screenshot as a picture.

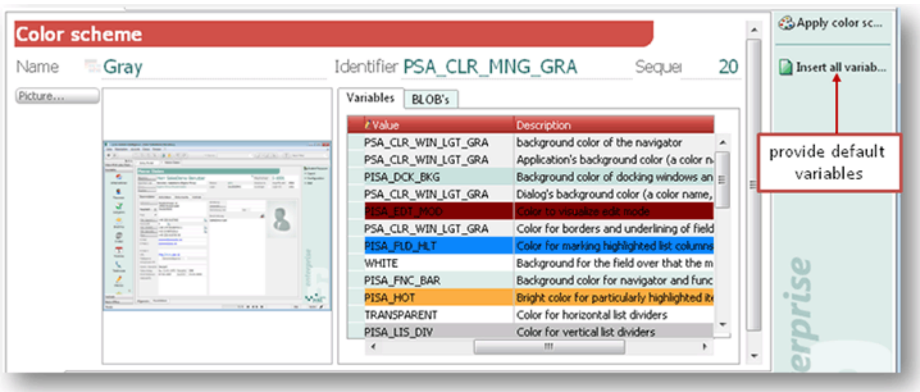


Figure 19-3: Administration list color schema with example design

Apply color schema

The function Apply color scheme caused that all variables of the color schema are copied and the color values are set for the group WORLD.

Note: *After change of the color schema the client must be launched anew.*

Menu representation

The color of the main menu or also context menu become modified by the color schema too. With the corresponding variables (PSC_CLR_MNU_ ...) you define the colors of the menus.

Icons in the menus

The client does not display icons before menu items with order menus. So a uniform GU design is supported. If icons with order menu are defined in the Repository, the feature can be controlled by the variable PSC_CFR_SUB_MNU_ICO.

+ n (default) = no icon representation in menu items with order menu
+ y = old behavior. In this case the icons defined in the Repository are displayed in menu items with order menu.

Fitting -title and logo- (Win-Client)

You make the changes in PiSA cubes/Resources-> sublist BLOBs or Environment. You can adapt or exchange the following elements:

+ the title of the PisaSales application window
+ the wallpaper for the startup and info dialog
+ the wallpaper for the function bar
+ the logo in the function bar
+ the logos for standard reports and standard letters (comprehensive)

Attention: *If other BLOBs were already obstructed in the templates for standard reports and correspondence templates as logos, and the BLOB name does not correspond with the PisaSales standard, a global exchange via environment variables is not possible.*

Element	Resource	Comments
Title of the application window	Server-Environment-Variable **PSC_APP_TTL**	Information about the current session is displayed in the title with placeholders in the text (see also client call parameters): %a = application name, e.g., PisaSales internal %u = user name, e.g., Mulder %h = host name, z. B pc-mulder %p = port number, e.g., 6666 Example for a title string: "%a - your market intelligence, user %u"
Wallpaper for the client-registration dialog and splashscreen	files in the client/ img-directory **info.bmp** **startdlg.bmp**	The designs are displayed as a wallpaper in the client-registration dialog and in the Splash screen. Note: + Size WxH in pixel approx. 525x355px. + Possible picture formats: BMP. + Input fields and buttons are fixed and not components of the wallpaper. Use simply the bitmaps delivered with PisaSales as templates.
Graphic for the info dialog	BLOB **PSA_INF_BLB**	The graphic is displayed in the info mask (top menu->?-> PisaSales info). Normally, you use here the same graphic as in the splashscreen (info.bmp).
Wallpaper for the function bar (Default bolt)	BLOB **PSA_PIC_DEF** is laso provided by the color scheme	The graphic appears always in the function bar when no graphic is defined specifically for the dialog. Notice: + Size WxH in pixel approx. 105x1100px. + Alignment bottom left. + Possible picture formats: PNG, BMP. + The graphic design of the upper area should be neutrally designed, because the dialog functions are displayed there.

Element	Resource	Comments
Logo in the function bar	BLOB **PSA_PIC_LOG**	The logo appears in every function bar in the foreground. Note: + Width approx. 105px. + Autom. Alignment bottom center. + Possible picture formats: PNG, BMP. + Transparency over background only with PNG. If you use several logos (e.g., for test purposes), the name of the displayed BLOB must be deposited user specific as a value in the variable PSC_LOG_PIC.
Logos for standard-report and correspondence templates	BLOBs **PSA_ICO_RPT_LOGO_REPORT** **PSA_ICO_RPT_LOGO_LETTER** PSA_ICO_RPT_LOGO_SMALL	The logos are automatically inserted into the standard templates. Note: + Orientate yourselves regarding the size and resolution on the delivered PisaSales logos (recommended for correspondences: a maximum of 640 pixels x 240 pixels, for reports: a maximum of 440 pixels x 150 pixels, resolution in general at least 300 dpi). + Possible picture formats: PNG (recommended), JPG. + Transparency over background only with PNG. + important: only RGB mode is supported, CMYK not!

Exchange graphics in the BLOB

Most PisaSales-graphic-resources are administered in the BLOB table and saved directly in the database. Proceed as follows if you want to exchange a graphic:

1. Open the PiSA cubes form resources, sublist BLOBs.
2. Search the desired BLOB name.
3. Select/mark the record.
4. Export the old BLOB for editing or saving.
5. Import the new graphic and save the record. The old graphic is overwritten in the database.

Note: *The button explosion shows you the total structure of a relation (e.g., all units incl. their subdivisions or all staff members who are also assigned to other units).*

Attention: *The PisaSales Web client uses vector-based graphics for the surface icons that are generated from a font. You have to make sure that you replace as a BLOB the identical file format with the intentional dimensions like the existing BLOB.*
Please contact your PisaSales project engineer if you want to change surface icons.

Upgrade ability of picture BLOBs

On both variables PSA_ICO_RPT_LOGO_LETTER and PSA_ICO_RPT_LOGO_REPORT blobnames can be registered, which then play an update script that always runs through the PisaSales versions of the blobs of the same name.

Note: *Find out from your PisaSales project representatives, because low customizing expenses are necessary*

The user interface - Win-Client

The PisaSales desktop is your center for mastering the daily amplitude of information and tasks. All modules like contacts, appointments, documents, cases, tasks and activities are united in a concise, interactive surface. "What You See Is What You Get" (WYSIWYG) labels this generation of PisaSales.

When you start PisaSales as a rule you see your personal PisaSales Entry portal or your cockpit and have access to the most important modules through a navigator bar.

The PisaSales desktop allows you to open several forms at the same time without losing the overview. The tabs, which you can position in the upper or in the lower area of the desktop, inform you where you can find open forms again and which record it is. With a click you retrieve it to the foreground.

PisaSales also offers useful, context-related functions for every kind of form which are just needed, in the so called function bar (on the most right side). In the form itself you work with active areas to which the particular functions refer.

Note: *All functions refer with the activation of a form area (click in the area) only to this form area. Therefore all standard functions and form functions are universally available.*

System spanning selection dialogs enable you to simply and quickly create, change or delete relations.

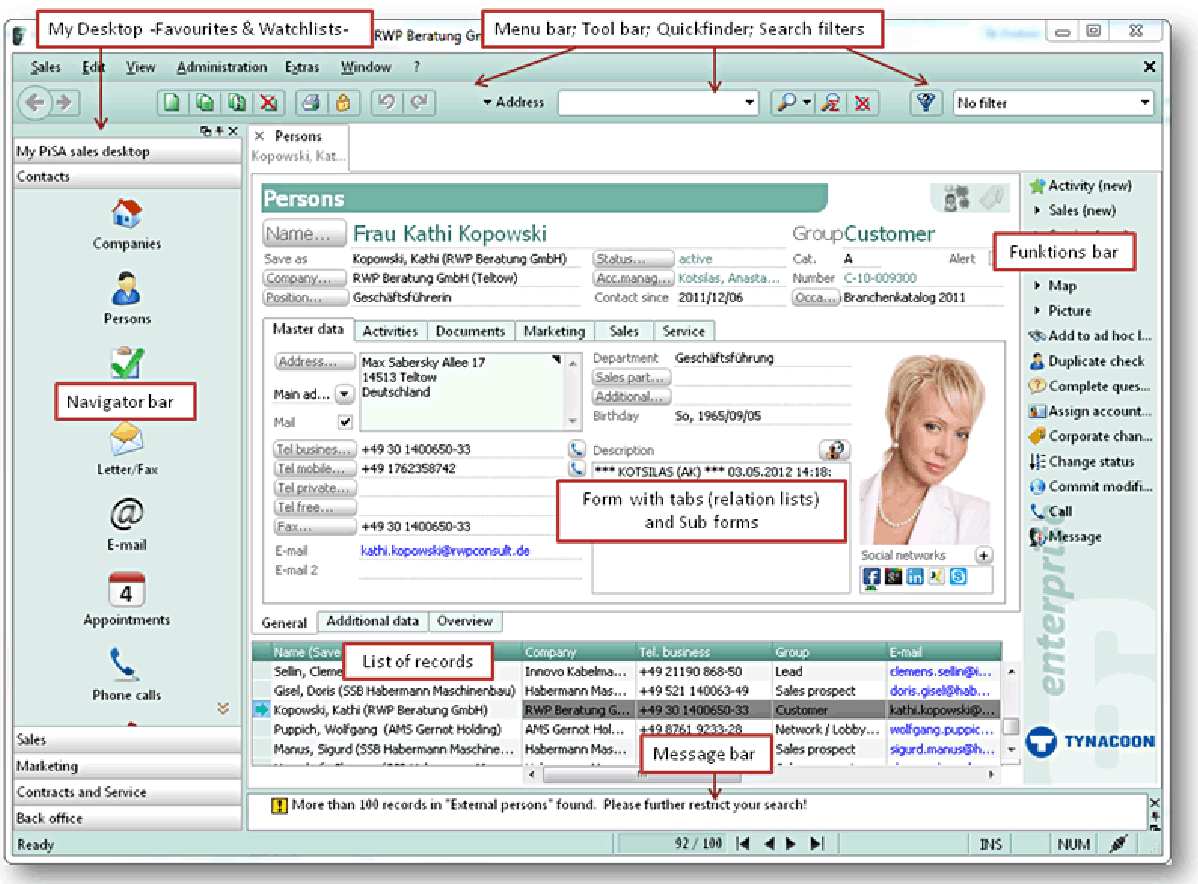


Figure 19-4: Desktop with opened contact form (person) - Win-Client

Menu View - Win-Client

Menu	Sub menu	Usage
Navigation bar	no	Shows or hide the Navigation bar
Browser	no	Shows or hide the browser bar (default is off)
Calendar	no	Shows the personal calendar
Message bar	no	Shows or hide the message bar (default is off)
Small symbols	no	Displays small icons in the navigation bar (16x16 px), default is off
Large symbols	no	Displays large icons in the navigation bar (32x32 px), default is on
Tabs on the top	no	Tabs on the top of the forms; default is off
Tabs on the bottom	no	Tabs on the bottom of forms, default is on
Multiline label	no	Shows the keyword/name of the current in the tab of the forms
Group similar dialogs	no	Groups forms of the same type only in one tab, default is off.
Close button on tabs	no	Shows or hide the close cross on the tab of forms, default is on
Tooltips in navigator	no	Shows tooltips below the mouse pointer in the navigator bar, default is on
Tooltips in dialogs	no	Shows tooltips below the mouse pointer in all masks, default is off
Fullscreen	no	Current form in fullscreen (F11)

Permanent toolbars - Win-Client

Like in other applications you will find common tool bars.

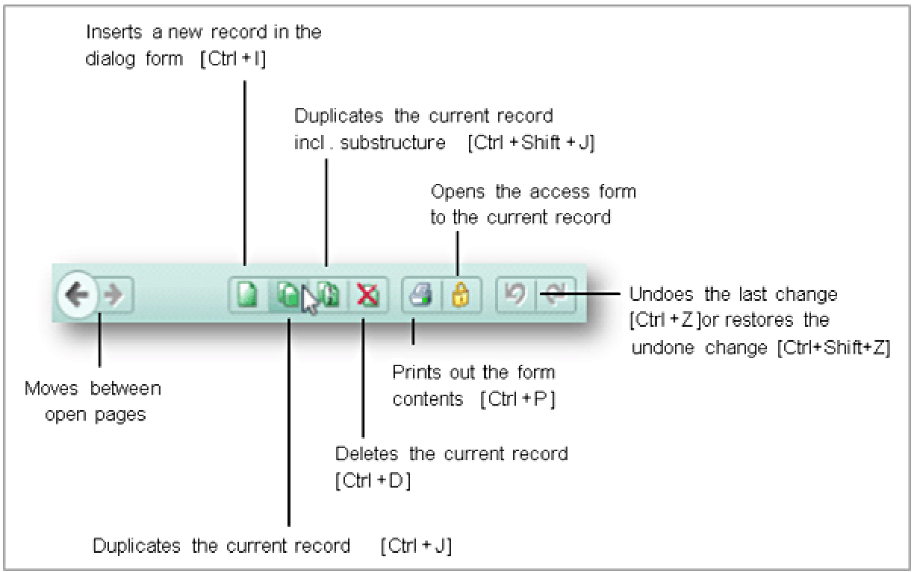


Figure 19-5: Default toolbar

Menu bar

All menu commands are available from pull-down menus in the menu bar. Further submenus are used for some commands. The menus adapt the availability of the menu commands to the condition of the active mask.

Toolbar with quickfinder

Through the toolbar standard functions for the editing of records among others are available. These functions are universally available, can be applied to any active area of the form and can also be found find in the context menu (right mouse button).

You can find the record paging function (Quickfinder) and the search filters always at the same place of the interface.

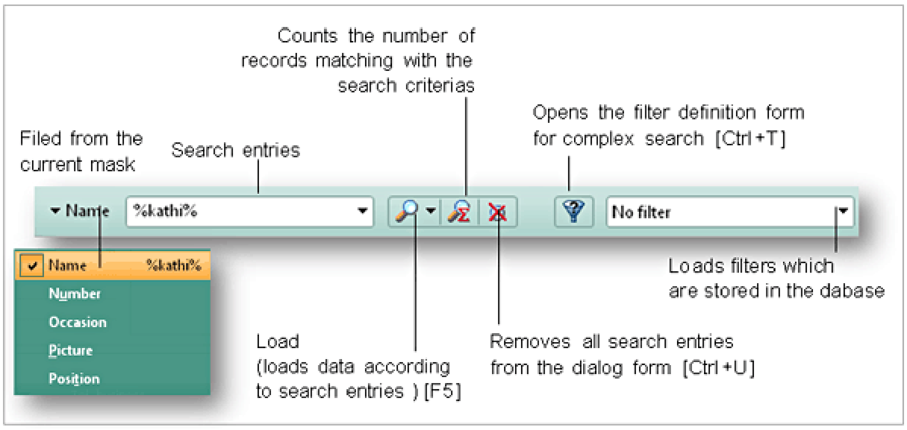


Figure 19-6: Quickfinder toolbar with filter selection

Note: *If forms are called on anew, they usually do not contain records yet. The records are loaded only according to the search entry with the command Load (magnifying glass), so with an empty search entry*

ALL records of the module are displayed. Avoid loading records without a search entry, because the search can last very long due to big dates inventories and a limiting search is always necessary anyway. The command Load is a constantly recurring standard command which is also used regularly to update the displays of all records.

Positionable toolbars - Win-Client

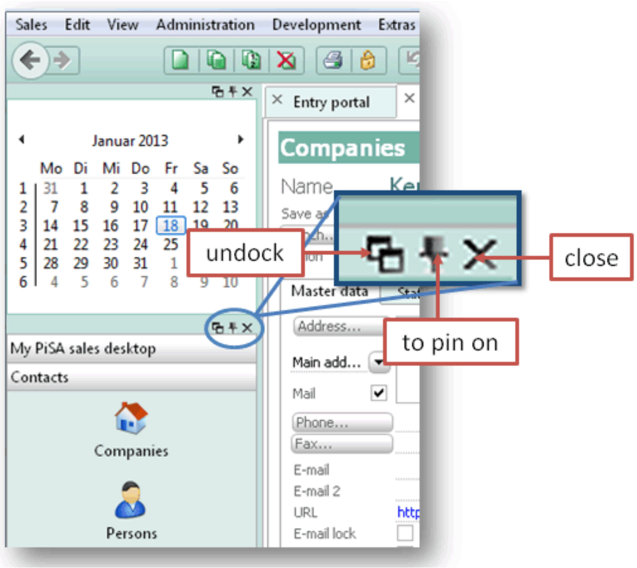


Figure 19-7: Representation and use of the toolbars

In the menu View you can switch on/off different bars. You are able to ...

+ undock and use as floating bars.
+ dock and fix at different places
+ hide as dynamic bars (not fixed)

these bars.

Dock

If is a bar undockt, at first of all it is floating and can be positioned at arbitrary place of yourdesktop/ monitor and be scaled too. As soon as you capture the bar while pushing left mouse button with the pointer in its upper title bar and move it, automatically the positioning tool becomes visible. Hold the mouse button pressed and lead the mouse pointer on one of the visible position markers. Immediately on the PisaSales desktop the area is marked where the bar would appear. If you drop now, the bar is docked in this area.

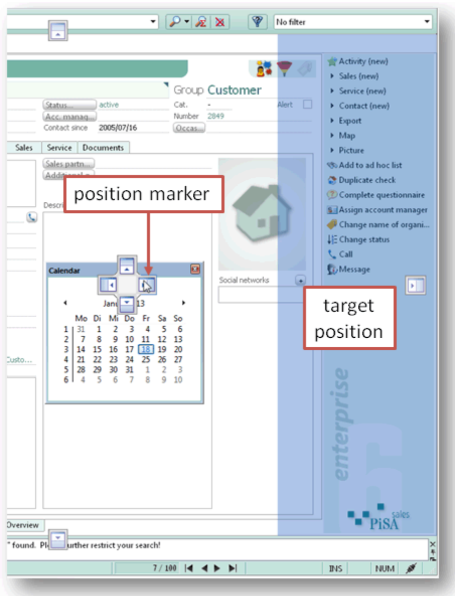


Figure 19-8: Positioning tool for docking

Hide dynamically

Docked bars can be dynamically hidden. Then they are to be seen only as a tab. As soon as you place the mouse pointer on this tab, the complete bar is made visible. Move the mouse pointer from the visible bar or click an area outside, then the bar disappears again.

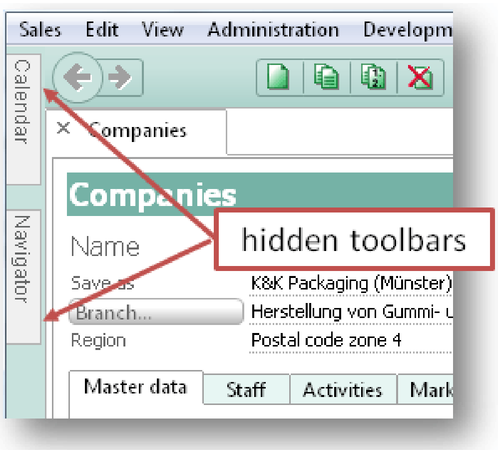


Figure 19-9: Toolbars dynamically hides

Whether the bar is docked dynamically or fixed, you determinde by clck on the symbolic pin needle in the bar (vertical pin = fixes, horizontal pin = dynamically).

Tip: To prevent that the bar disappears immediately again, simply click on the tab of the visible bar. Only if you again click outside of the bar in a mask, the bar disappears again.

Navigator bar

The navigator bar on the left side offers access to all modules and almost all forms. Here you can choose modules or forms with a click. Groups, in which a summary of important forms is provided according to the organization sales are changed in the navigator bar with a click through so-called sliders.The bar integrates further tools.

My desktop -favorites browser-

In the navigators bar you find the group My desktop.

Here you see the most important filters and can make a choice immediately. The nodes of the filter tree correspond to the overview lists of the respective objects. The filter which are available in these overview lists are indicated. You open the respective overview list with the elective filter by hyperlink on the filter in the tree. Changes in the filter dialog through the commands create and delete affect the filter tree. The filter tree is updated with F5 or by Load in the context menu.

Favorites

Furthermore you can create your own favorites folder (right mouse click on Favorites) and collect records quite simply with drag and drop from PisaSales. In addition, you can likewise deposit documents and date files from local directories the favorites folder as combined documents with drag and drop or collect web addresses as an URL from the Internet Explorer. All favorites are hyperlinks which open the corresponding object immediately. PisaSales integrates regularly required applications in this group by default, which can thus be started directly from PisaSales.

Watchlist/Filter/Drill-down

Watchlists are filters which automatically monitor the system or refresh it. The updating encloses all filters which are defined under Favorites in Desktop. By command (right mouse button, there Add filter/drill-down), the user can apply filters from the up to date displayed form as well as drill-down paths in its favorites under Desktop. Then any change of the number of the records which concern the Watchlist is registered immediately and displayed as a number in the Watchlist.

Admin: *The interval, in which the favorites are updated, is determined by the Administrator with the variable* PSA_SET_RFR_FVR_TIM_ITV*. Interval in minutes. With a value 0 the favorites will not refresh.*

The watchlists and drill-downs behave like the hyperlinks known in PisaSales. The corresponding form or list is opened via mouse click and the result of the default defined in the Watchlist is displayed.

Attention: *For performance reasons, drill-down paths (just like complex filter) should be included only frugal in the desktop, because these are automatically refreshed when the desktop opens.*

Browser bar

Via the top menu View an additional browser bar can be displayed which shows group structures and region structures beside business sectors (product line) and industries.

Calendar

Extended entrance in the Entry portal. See below -> Personal calendar - Win-Client

Message bar (Win-Client)

In the lower part of the form PisaSales shows system messages in a standard-message bar. The message bar can be positioned individually. With a click of the right mouse button in the message bar other functions become available.

Messages specific to a form are displayed only for the current form. The message bar is strictly associated with the active mask. With a change to another mask the content of the message bar also changes.

Admin: *Messages can be provided with a sound and an icon. Integration of Sound-BLOB and Windows-system sounds are possible. Message icons are usable.*

Only the first row is given in the message bar for multi line messages. If required, the total text can be expanded. Messages can be opened, e.g. to copy a part of it in an edit control (F2).

Tip: If a message with a hidden Message bar (pin off for PopUp) can not be completely captured immediately, it helps to place the mouse pointer on it to keep it until the mouse pointer is moved away again.

Admin: *The retention time of the message PopUp is defined as an environment variable in the administration console (PiSA cubes client setup).*

Quick-views -Win-Client-

At hyperlink fields in forms and lists so called QuickView dialogs will appear when the mouse pointer sweeps over. They show basic information of the linked object without having to open this explicitly by hyperlink.

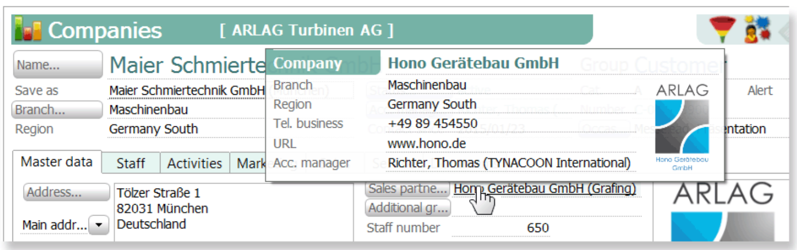


Figure 19-10: QuichView of the sales partner at a company

Admin: *A customizer can generate own QuickView dialogs, adapt and link them.*

Rules for sensible usage of this feature:

- In Master forms: at component fields
- In lists: at component fields, at master fields only, if few significant (less then 3) or very untypically attrubutes are represented in the list.

Masks and forms -Win-Client-

Display, activate, change, close several masks

Every time you open another module form in PisaSales anew, the previous mask remains in the background. Every form possesses a tab, through which the mask is activated. With the tab a mask can also be closed individually. If you have many opened masks, use the menu Window.

Multi line label

In the menu View you can activate the option Multiline label. Thus you'll see already at the tab of a form always the name of the just indicated record.

Groups of uniform masks in the form tab - Win-Client-

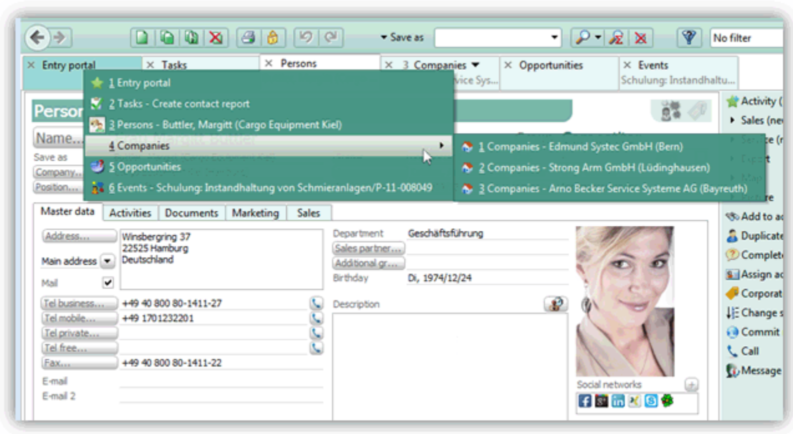


Figure 19-11: Choice a form from out a grouping

The grouping of masks in the task bar is the same as in Windows XP. PisaSales supports grouping of similar dialogs in the form tab. If several forms of the same data class are opened, and the available space for the positioning of the tabs of the forms in the client is too small, an automatic grouping of forms of the same kind under a single tab is carried out, if requested. A form change is possible via the object menu in the tab. Drag and Drop is also supported in grouped forms. The feature for the grouping can be activated through the menu View.

Dynamically dimension of mask areas

The PisaSales standard supports a little helpful feature to dimension certain areas in a mask dynamically to be able to display data better or more completely. This refers, primarily, to masks/forms, which are technically constructed with so-called areas. Areas are, for example, separate ranges with tabs within a mask or also the visible sublist of a form is such an area (e.g., tab General of a form is reduced (not expanded) and the sublist is visible as a table.

It will not be possible, in any case to dimension form areas dynamically, even if the form at first looks so.

With the user-specific environment variable PSC_CFR_RCL_MAT every user can activate/deactivate this feature. The default setting is deactivated (n).

See also: -> Maintenance of own data and configurations *->Configure own data and system preferences*

Note: *After this variable became changed, the client has to be relaunched anew.*

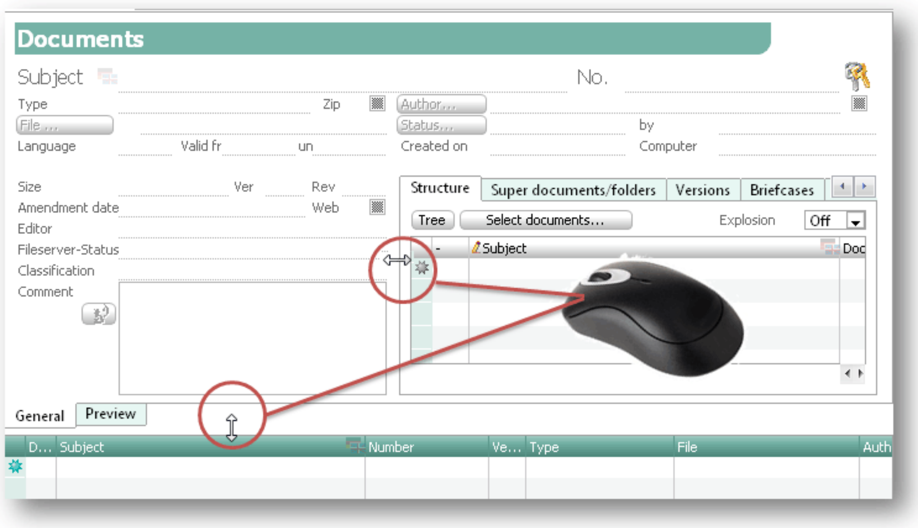


Figure 19-12: Dynamic dimensioning of mask areas

Attention: *The feature does not works under circumstances with mouse drivers where the keys of the mouse are reserved with special functions.*

Note: *To recover the default state of the mask/of the form, use the hotkey [Ctrl+ALT+R].*

Lists - Win-Client

Apply marked records in the form

The function Show in form allows to display marked records of a list (overview list or sublist of the master form) in the corresponding master form without opening every record successively by hyper-link.
Simply mark several records and click the function Show in form in the function bar.

Scroll records in lists - Win-Client

In lists you can navigate with the mouse wheel comfortably in the loaded data:

If a record is selected in the list, the selection is preserved while scrolling. It is moved up and down. If the list has a vertical scrollbar (many records loaded), the selection is scrolled out of the visible area, just like in MS Excel or MS Word.

[Ctrl+wheel]: The selection remains in the visible area with a pressed Ctrl button. It will automatically be transmitted to the neighbouring record, while the list content is moved out of the visible area.

[Shift+wheel]: If a list has horizontal scrollbars and a record is selected, the non-significant columns of the list are scrolled horizontally by using the mouse radian and pressing the shift key.

Change column width and line height in lists

Move the cursor slowly to the horizontal or vertical column boundary line in the margin of the list until it turns into a double arrow. Drag with a pressed mouse button to adapt the size to the cell content.

Shift column titles in lists

Click a column title in a list and hold down the mouse button to move the column header to the left or right to change the order of the columns. This state of the columns now is stored for this list. Significant fields you cannot shift.

Hide/view columns

The object menu displays all field titles of the list with a right click of the cursor on a column title. Delete the check mark in the title that should be hidden as a column, or place the check mark if the column should appear again.

Splitting a list -Win-Client-

Any list can be divided horizontally into several lists if a lot of entries exist and a scrollbar in the right margin of the list appears. Point on the division field on the bottom of the vertical scroll bar with the mouse pointer. If the pointer has accepted the shape of the division pointer (double arrow), drag the division field upwards to the desired position. You create further horizontal subranges like this, so that you can scroll, e.g., in different list ranges.

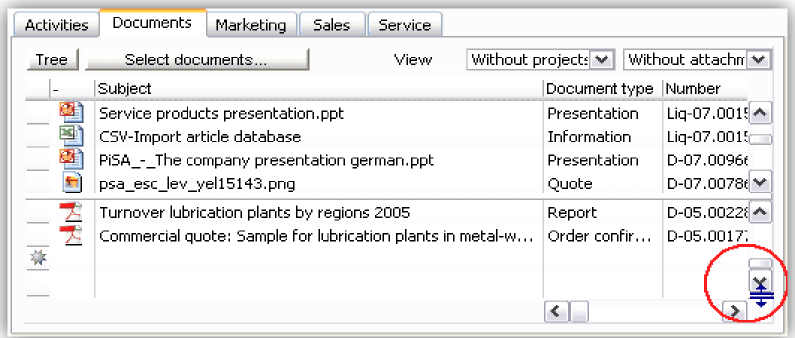
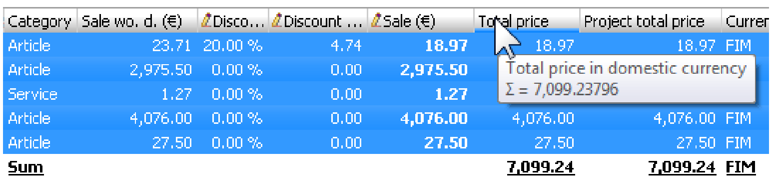


Figure 19-13: Split a list into multiple horizontal areas

Calculation of the column total in lists

Values in numerical fields (integer, float, money) are added up in lists by column. The total accumulation follows by the selected records and is displayed in the tool tip in the header of the corresponding column. The representation of the total is language-independent.



Category	Sale wo. d. (€)	Disco...	Discount ...	Sale (€)	Total price	Project total price	Curren
Article	23.71	20.00 %	4.74	18.97	18.97	18.97	FIM
Article	2,975.50	0.00 %	0.00	2,975.50			
Service	1.27	0.00 %	0.00	1.27			
Article	4,076.00	0.00 %	0.00	4,076.00	4,076.00	4,076.00	FIM
Article	27.50	0.00 %	0.00	27.50	27.50	27.50	FIM
Sum					7,099.24	7,099.24	FIM

Figure 19-14: Total of the market column values as tool tip

+ Click into a field of the column, you want to summarize. Mark records in any order and put the mouse cursor on the header of the column which contains the values you want to total.

Copying of the column total calculated in lists

To be able to copy the total value for further usage it has to be transferred in the message row.

+ Click in a field of the column in which the values should be added up.

+ Mark all or any records which should be added up. Press the shortcut Ctrl+Alt+S to transfer the total value in the message row.
+ Mark the String in the message row and copy it to the clip board.

Admin: *With the environment variable PSC_CFR_COL_SUM your administrator can switch this feature.*

Open files directly (icon)

In the lists which show document records you see on the left side of the Subject an icon. By clicking on the icon, the file of the document record is opened with the linked application (e.g. a Word document with Microsoft Word).

Note: *Instead of a visualization the text " unknown blob type () " can appear in the mentioned field. This means that the BLOB has checked in but there is no Viewer for the file type on the system on which the client runs. Then the BLOB field can only be used to Save (and retrieve) and not to display. Example: Outlook does not make a Viewer for its MSG format (whether with or without attachments) available to the outside.*

Fullscreen (F11) - Win-Client

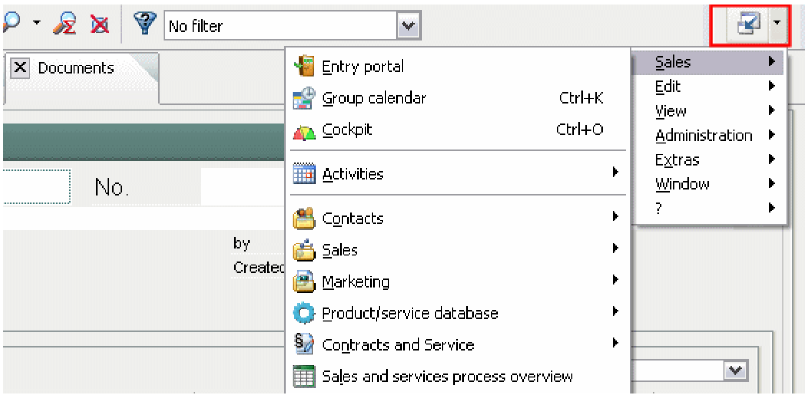


Figure 19-15: Use menus in fullscreen mode

Via the menu View or the key F11 you change the actual active forms to fullscreeen on the monitor. In this case you can enter the PisaSales menus besides the button Restore main window without leaving the fullscreen mode. Here you also can get the "covert" menus.

Data quality -Win-Client-

The PisaSales standard offers a general solution to the field specific storage for of comments and data quality information (data quality level high, medium, lowly, no entry means no weighting). The data are maintained by the user in a special dialog (DQU dialog) which can be opened in the field. The storage of the data happens in a special data object (PSC_DQU). The field entries which have received a valuation are highlighted in forms and lists graphically (colored triangle on the top right in the field).

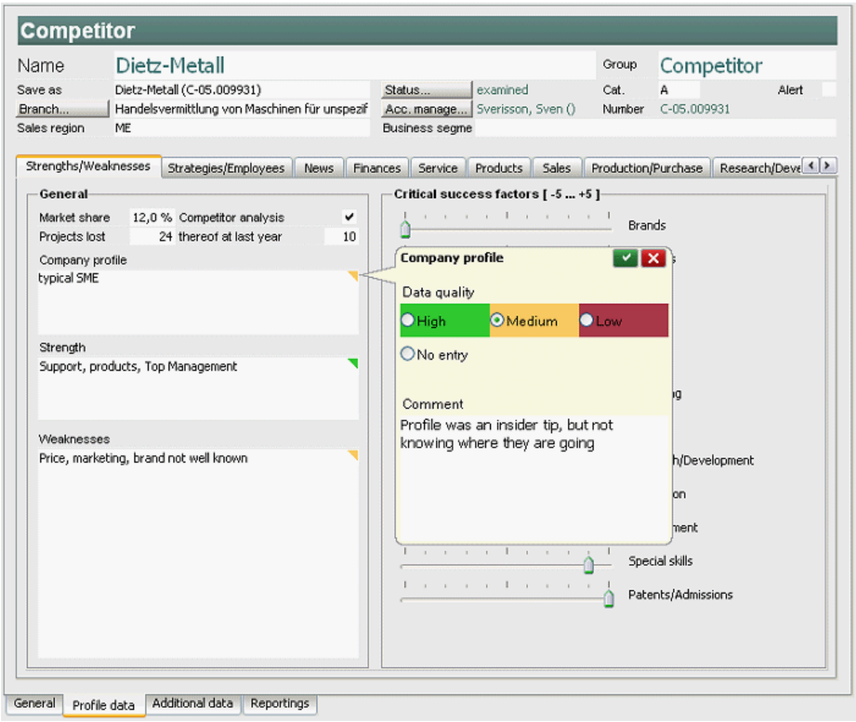


Figure 19-16: Fields which data quality was rated

Behavior, operation

If a field is declared as a DQU field, with the combination [Ctrl+click] or [Ctrl+F2] in the field you open the DQU dialog.

Note: *The behavior is solidly encoded in the PisaSales client. That's why [F2] don't have to be reserved as a hot key in PisaSales.*

+ In the DQU dialog you can create DQU data anew.
+ Click one of the radio button for the quality level.
+ Register if necessary a comment.
+ Store the information with click on the green check mark (hook).
+ After saving and closing down the dialog a new DQU record is created.
+ If the DQU dialog should be closed without changes, you click the little red cross or simply press [ESC].

An already existing DQU record is automatically deleted if the DQU dialog is saved with no entry and empty comment field.

Default with new creation new of a record is for all date cells: no comment, no entry. No DQU records are created in PSC_DQU if no valuation follows.

Open dialog again

If a DQU level was created in a field, then it receives a small colored triangle on the top right in the field. The colors of the DQU icon are depending on DQU level (red = low, yellow = medium, green = high). To open the DQU dialog, follow this procedure.

+ Click on the colored triangle (not directly in the field!, because otherwise the black triangle for expanding of the field appears) to open the DQU of the dialog. If you click, nevertheless, in the field, one above mentioned keyboard shortcuts have to be used to open the DQU of the dialog.
+ Achieve necessary changes in the dialog and save again with click on the green check mark or the known keyboard shortcut [Ctrl+S].
+ Close down the dialog with [ESC] without saving changes (cancel).

Note: *Comments can be deposited only in the TXT format.*

Admin: *There is no explicit DQU mode. The feature is available basically. It must be released in the customizing explicitly in the required objects on data and dialog level. Please, refer to your PisaSales project representative.*

Standard functions for research and the editing of data - Win-Client

The standard functions in PisaSales serve the creation, the search and the treatment of records. If a record is accessed, edited, investigated or created anew, you find all standard functions in the toolbar as well as in the context menu (right mouse button).

The standard functions are available in the symbol bar and just as via the context menu with the right mouse key.

Toolbar Button	Context menu	Key	Operation
	Load, Query, Update with History selection	[F5]	Fills a mask with all records from the database according to search entry (if the search entry is empty, all records are loaded).
	Clear	[Ctrl+U]	Deletes all search entries-> afterwards new query possibly.
	Count	-	Shows the number of the found records concerning the search entry.
	Filter	[Ctrl+T]	Search records according to certain criteria in the database.
	Insert record	[Ctrl+I]	Generates a new record in master.
	Duplicate record	[Ctrl+J]	Duplicates the current/marked record within the mask without structures.
	Duplicate structure	[Ctrl+ Shift+J]	Duplicates the current record with all structures within the mask.
	Delete	[Ctrl+D]	Deletes selected records finally.
	Save	[Ctrl+S]	Saves the changes in the database. Function only visible in the function bar of the form while editing.
	Cancel	[Ctrl+Q]	Resets the source state of the record. Function only visible in the function bar of the form while editing.
	Multilinguality		In every field where you see this symbol the entry can occur in several languages (click on the flag).

Multilingual fields

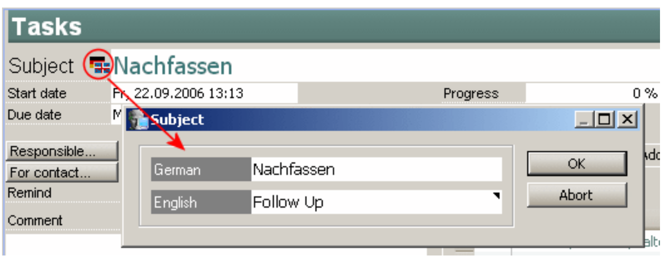


Figure 19-17: multilingual filed with two languages

The multilingual concept of PisaSales supports the development of multilingual interface objects and reference data entries. In selected fields reference data can be administered in several languages (e.g. all filter titles and Subject of the activities). All fields which include the country icon (normally inverted) can contain multilingual entries.

Attention: *If PisaSales is used multilingual in a company, the relevant reference data always has to be registered in the respective languages. Otherwise the data are not or only prefilled by the standard (prefix: ### ...) displayed when you shift to the secondary language. The prefix can be determined by the environment variable PSA_LNG_DAT_PRE arbitrary.*

Snapshot

A local folder (subject) which contains the snapshot of the associated sales cases, documents or contacts is created by snapshot function from the record. The project folder registers all cases with the most important assignments (contacts, documents etc.). The function "snapshot" also illustrates the folder structures adequately in the file system.

In the file system, a folder is generated if the function hits a "document" with the identification "new folder" or a document of the type "Folder" (old folder picture).

The export of the type / classification folder is switched off in the standard by function parameters.

If a document contains sub documents, the upper documents are stored in the file system as a file and its subdocuments in a file with the same name.

The snapshot of a sales case, a marketing action or a service case contains all associated activities whose comment field (Note or Note/Report) is not empty.

List of hotkeys - Win-Client

PisaSales can be operated with hotkeys similar to the operation mode known from Windows. The hot keys have the same effect in PisaSales and Windows. In addition, there are special hot keys which activate different objects and special commands and functions in PisaSales.

In lists the keys [Pos1], [Ende], [PgUp], [PgDn] with their combinations are also supported.

Here you can make a printout of the list from a PDF (internet connection required).

-> Print version of hotkey list -Win-Client

The Entry portal - Win-Client

The Entry Portal is, so to speak, the greeting portal for your daily work. Primarily, it represents an activity list in which the chores of the **logged** in user are displayed, optionally for one day, one week or one month. The user usualy only sees the open (not finished) activities for which he himself is responsible (the Responsible) or for which he functions temporary as a substitute. If the user is the participant of an appointment, he also sees this appointment in his Entry Portal. Superior staff employees can display here the Entry portal (the activities) of the subordinate employees.

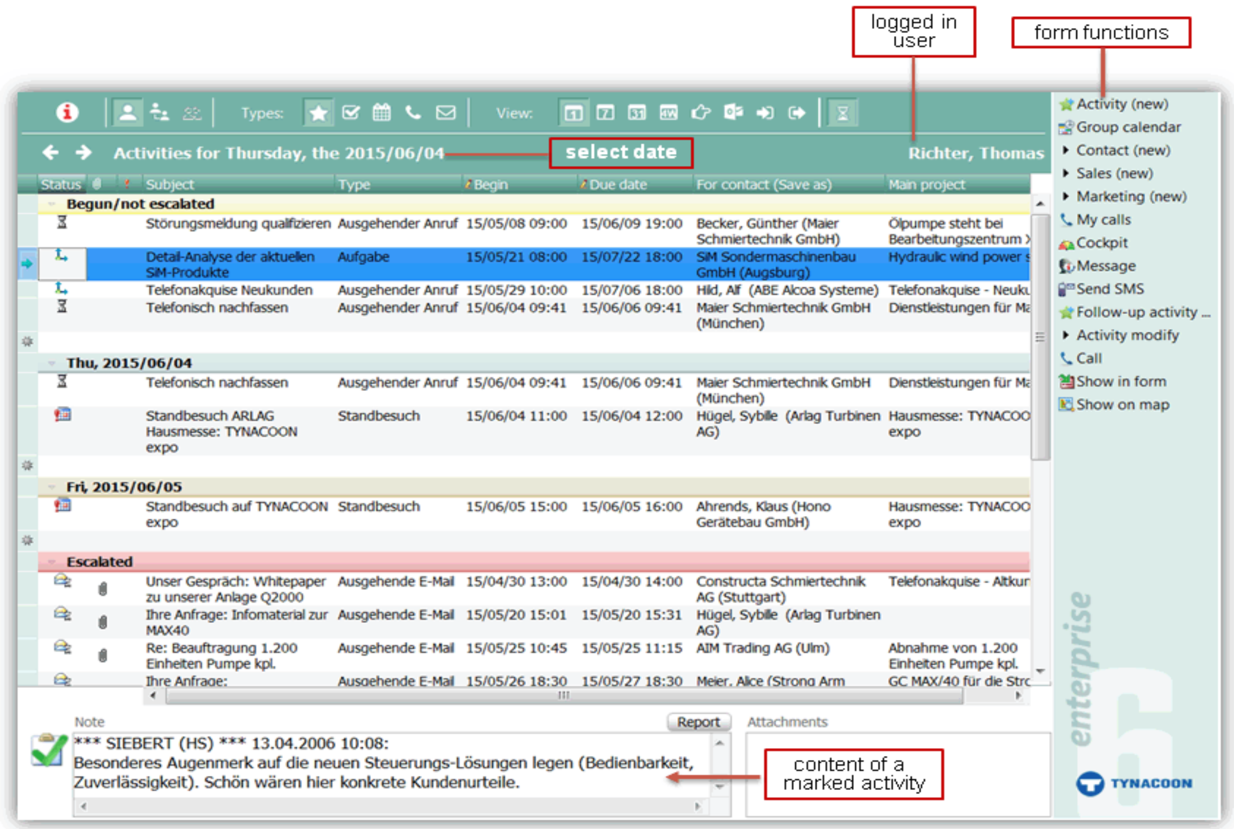


Figure 19-18: PisaSales Entry portal

***See also:** back to work with PisaSales in general -> The Entry portal - Win-Client*

Display mode - Win-Client

The button Open is ordinarily activated, so that only open (still not finished) activities are displayed. You can display, however, also already certain finished activities. For a navigation in the past you will use certainly the Personal calendar (menu View/Calendar) to see also finished activities. Therefore, the button Open is already switched off in this case.

Figure 19-19: Symbol bar of the Entry portal

To select a view you use the buttons on the symbol bar of the Entry portal.

Day

Displays the already escalated activities grouped after days, as well as those not escalated activities which will be due on the selected and the following day.

Week

Shows, grouped after days, on the one hand, the already escalated activities and, on the other hand, the up to date beginning activities which are not escalated yet.

Month

Shows, grouped after calendar weeks, on the one hand, the already escalated activities and on the other hand the up to date beginning activities which are not escalated yet.

4 weeks

Shows, grouped after calendar weeks, four weeks from the set date to futur, on the one hand, the already escalated activities and on the other hand the up to date beginning activities which are not escalated yet.

Modified

Displays "Modified activities". The view includes all activities which processed during the selected period of the logged-on user. So such search approaches of users, like "I have just recently had written one of my colleague XY somwhat" are supported.

Delegated

Shows all activities (except correspondences) delegated from you which are open or escalated separately.

Note: *Although you can chgange the responsibilty (Additional Data) at correspondences they are not delegated. So you can not see correspondences in this case. But you can see correspondences in the usual view when the responsible has changed.*

Substitute (Win-Client)

The button is only active if a substitute is registered. If there are several to be substituted, a selection list opens. Only in the currently period of substitution, the activities are displayed. In the portal all all open activities which the registered user has accepted as a substitute for another user are displayed as long as there is access to. If an activity is in the substitution period, it is displayed in color.

If the substitution is completed, the "foreign" activities disappear from the list again. The substitution is determined by the initiator in the form My data in the field ubstitute and can be lifted only by himself. In the substitute selection, you can select every staff member of the company. Let yourself substitute however preferred always of a member in the same group (department), that knows your PisaSales-objects.

See also: -> Maintenance of own data and configurations -> Substitution

Groupware

Shows the synchronization status of activities. The synchronization status in every activity record gives information whether the activity has not been synchronized yet, was already exported or was already imported again from the Groupware.

+ [cross] activity was not exported yet
+ [arrow to the right with GW symbol] activity was exported in the sync. date (appointment in authorization/distribution)
+ [arrow to the left with GW symbol] activity was imported in the sync. date from the Groupware (appointment authorized inside)

In the view Groupware you open the calendar of the function bar from the Groupware you use. When you open the system for the first time, it asks you to indicate the specific folders in the Groupware. If you click in this dialog on accept as standard, you do no have to repeat these specifications.

Inbox/Outbox

Displays all e-mails, letters and faxes with comments from the record as well as attachments that were imported or checked into PisaSales during the selected day. These are the correspondences where the logged in user ore a selected user is sender or receipient. You can define a time period for the display through filters, e.g., for the date of receipt.
If the calendar is used it controls the period displayed in the Inbox / Outbox. The forward and back buttons shift the period then depending on the search condition. In addition, a filter "In the last 4 weeks" is provided. As a result, a large amount of recent correspondence independently can be represented and searched from the current date.
Incoming mail, which is distributed through the back office as letters / faxes (scanned and created as incoming letter), is forwarded to the recipient(s), because the back office enters them as recipients of the mail. The recipient receives a message which informs him about the in-box with the saving of the letter / fax.
The Outbox shows the correspondences for that day (e-mails, letters and faxes), that were already created and sent from PisaSales. These are the correspondences where the logged in user or the subordinate staff is the sender or one of the receipients (Zo, CC, Bcc).

Admin -> Adjustable view in the Entry portal

Admin: *For the user the preferential view can be defined in the Entry portal. The environment variable* PSA_EPT_LST_VIE *controls with which view the Entry portal opens. If the value* LST *is, the last view is noticed.*

Note fot the administrator

A subdialog of the data object PSA_EPT_ACT_ESC (Entry portal) can be also stated as a value, in addition, then it is changed always automatically in this view while opening .

E. g.: Entry LST:PSA_EPT_ACT_DLG_SSC corresponds to opens with view "delegated activities" LST: Last view is noticed

Global default remains PSA_EPT_ACT_DAY_SSC

Default is $NONE, thereby everything remains with the old one and the view "day" is opened.

The variable PSA_CLD_EPT_CTL ("Can the calendar control the view and the types of the Entry Portal?" - y|n) determies whether the calendar bar can control the present time periods, types and the maturity (yes or no). Default is y.

Yes means, marking in the calendar bar controls all types in the Entry portal and marking in the past controls the maturity.

No means, only the selexted time frame ist shifted in the Entry portal and the types and maturity are not controlled.

This can be helpful if the marked period show the future, then only open (OPN) activities are represented. In the past it could be useful to find closed (DON) activities via the calendar bar too.

Messages at the Entry portal

A context-sensitive button left in the header of the activity list (info bubble) registers whether open messages or reminders exist. If messages exist (button is active, symbol coloured) the list of messages can be opened with the button.

View user

On the right side next to the button for messages you see the name of the user currently logged in. If you click this name, a selection dialog opens, in which you can select the people who stand in the internal company hierarchy below this person. An executive can thus survey the activities of employees below his level (in his department).

See also: -> Hierarchical structuring -Access groups-

To get back to the Entry Portal of the currently logged in user (meaning the own Entry Portal), click the small business card symbol (Me) on the left of the user name.

Activity types

The display of the activities in the list is arranged through a filter button in the header of the activity list as Tasks, Appointments, Phone calls, Correspondences. The filter button All activates/deactivates the other filters.

Activities are stored as groups that depend on beginning date and due date. Groups are separated by coloured crossbeams which can be vertically expanded / diminished. In order to do that click with the cursor on the small triangular symbol at the right end of the respective group beam.

+ escalated
+ started/ not escalated
+ normal maturity (according to view)

You jump from the activity list directly through hyperlinks into the activity (click on the entry in the field Subject) or directly into a linked project or case (click on the entry in the field Project).

If you mark one or several activities, special functions are made available in the function bar for the activity.

Activity details

Details for the currently marked activity are indicated in a special form field under the activity list.

Scroll by calendar

Depending on which view was selected, the arrow keys left in the header row of the activity list can toggle the view on the activities by date.

If you click with the cursor on the right row beside the toggle arrows Activities for ..., a calendar control opens for the selection of the view of a selected display date.

Personal calendar - Win-Client

With the personal calendar you have an advanced entrance in the Entry Portal.

Note: *Do not confuse the personal calendar with the Team calendar*

You can use and position the calendar as a fixed or dynamic bar. Days in which you are involved in an appointment are highlighted in the calendar (bold). Click on an arbitrary day in the calendar, then the Entry Portal with the entries of the elective day is always activated and retrieved in the foreground. This happens no matter whether the Entry Portal is already open or other masks are to be seen.

Note: *Notice that this kind of the synchronization will transmit only from the personal calendar on the Entry Portal, but not vice versa.*

Indicate time period

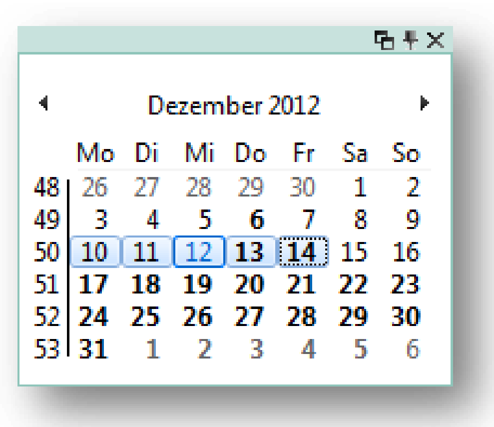


Figure 19-20: Marked time-frame in Personal calendar (language dependent on operating system)

In the calendar you can mark by drawing with the mouse pointer or holding on of the shift key during the click, a timeframe across several days. This causes that your personal Entry Portal with the activities for the markedtimeframe is opened or is displayed.

Note: *If you try to mark a range across several weeks or months, the highlight is automatically terminated after a timeframe of 128 days and is not continued. Thus an unintentional overflow and possible crash of the system is prevented.*

With the highlighted timeframe the Entry Portal always shows the implemented display mode which makes sense in this situation.

Example:

+ several days marked-> day's view/week view
+ several weeks marked-> four week view/calendar week

Just play with the calendar and you will get to know its principle very easy.

Form functions -Entry portal- Win-Client

The form functions right in the function bar serve the creation of new activities, new contacts and new sales records or marketing actions as well as to the control of available activities, directly from the Entry Portal.

A click on the function opens the corresponding object to create a record, to show information or to determine definite attributes of selected activities.

Activity

See also: *Chapter Activities and tasks*

Contact (new)

Siehe auch: Chapter Contacts

Sales (new)

Siehe auch: Chapter Sales

Marketing (new)

Siehe auch: Chapter Marketing

Service (new)

Siehe auch: Chapter Service

My calls

Siehe auch: Chapter Contacts

Cockpit

Siehe auch: Chapter Analyses with PisaSales

Activity functions

If you mark an activity, the menus Follow-up activity and Activity modify with further context sensitive functions are available more. Thus you can modify e.g. immediately the status of an activity without opening it first.

Follow-up activity (New)

You create a copy of the selected activity. All informations are applied in the follow-up activity.

Modify activity

Siehe auch: Chapter Tasks and activities -> Activities and tasks

Helpful features

+ A double click on the beginning of the line resets the line to original height / auto-line height
+ The column order can be changed by drag and drop of the column titles. The individual column positions are not being saved while the application is shutting down.
+ Columns can be faded in and out with a right mouse click on the column title.
+ All rows can be stretched vertical simultaneous by holding the Ctrl key when dragging the horizontal border with the mouse cursor.