PROLIN Smart Client 2020

PROLIN Smart Client 2020

The information contained in this document is subject to change.

Reference: PROLIN Smart Client 2020 -

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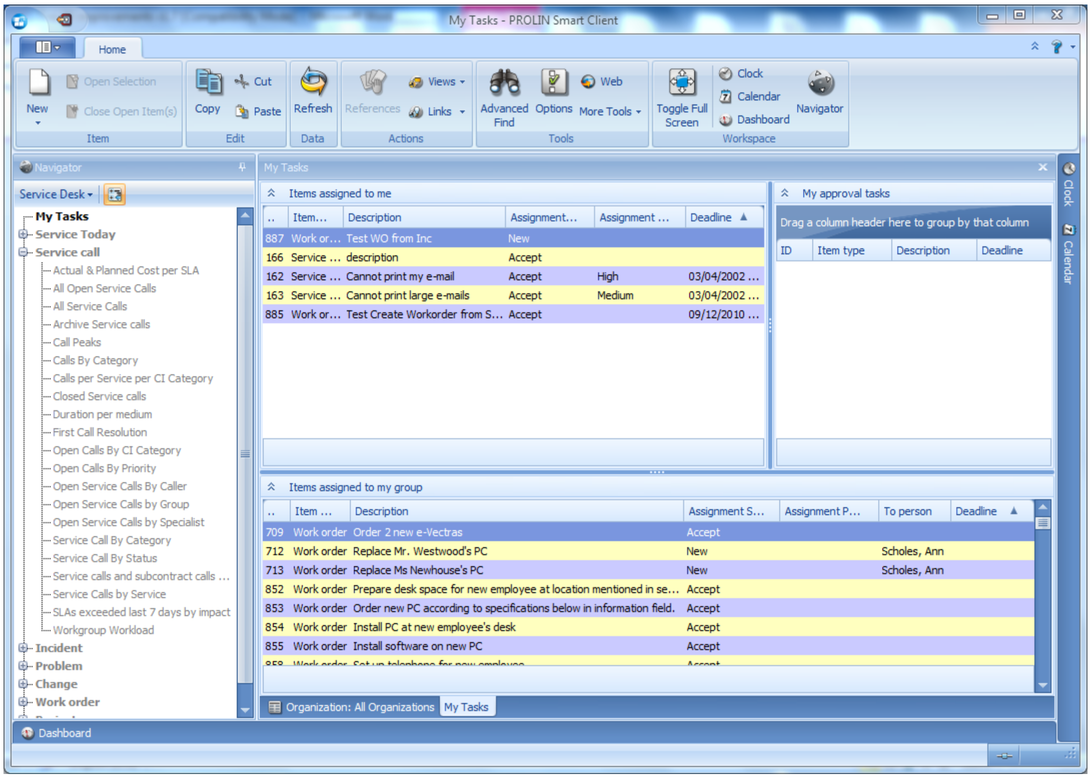
Table of Contents

1 Welcome to PROLIN Smart Client

Welcome to PROLIN Smart Client. PROLIN Smart Client is a robust, thoroughly tested client for your Service Management System. Using PROLIN Smart Client you secure the investment you made in your Service Management System and add modern flexibility, feel, and software quality you are used to from using Microsoft products.



PROLIN Smart Client 10

PROLIN Smart Client is built from the ground up. The basis is a new, very solid core. The PROLIN software development process is based on testing. You can be assured that every line of code is thoroughly tested. PROLIN Smart Client is created using the latest technology and the latest, most efficient software development methods. With almost 20 years of software development experience, PROLIN provides you the very best in ITIL support software.

PROLIN Smart Client enhances your Service Management System installation with a client that fits in a Microsoft Office work environment. You can use the functionality you are used to in your favorite office application. The look and feel of PROLIN Smart Client is close to Microsoft Office 2010.

PROLIN Smart Client is only the start of easy to use, powerful and flexible ITIL implementations.

1.1 State of the Art User Interface

The user interface of PROLIN Smart Client is very similar to the look and feel of Microsoft Office 2010. PROLIN Smart Client will be familiar and actions you can take in the Microsoft Office user interface are applicable to PROLIN Smart Client.

The user interface components in PROLIN Smart Client are consistent throughout, giving each component a recognizable look and feel.

1.1.1 Gadgets and Action Windows

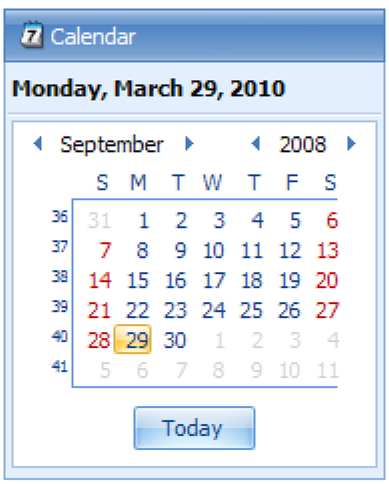
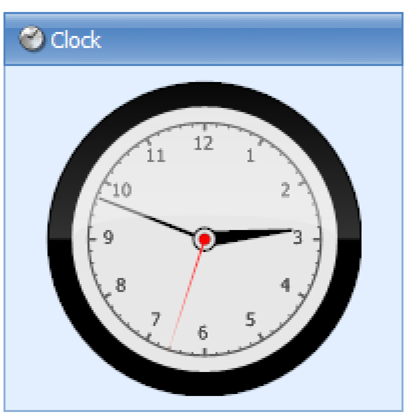
The action windows will help you to structure your work in the UI. You can place the tools at a location in the workspace of your choice. Have the tools available at the spot where you need them. The tools that make your working life enjoyable will be made available as Smart Client gadgets. PROLIN, PROLIN's partners and third parties are working to create the Smart Client gadgets that make ITIL even more easy.

Two currently available tools available in action windows are:

- The navigator that makes it easy to find the items used in processes.
- The attachment management window used in forms to manage attachments.

Smart Client gadgets are easy to read user interface components. Smart Client gadgets show information in a colorful, compact or joyful way.

Currently, the following Smart Client gadgets are available:

Calendar	
Clock	

Smart Client gadgets are pluggable components and may be provided by PROLIN, PROLIN partners or third parties.

1.2 Highest Quality

The PROLIN development team makes use of the latest methodologies to create PROLIN Smart Client. With test driven development the PROLIN development team makes sure that every line of code is tested several times a day. Every day new tests are added in order to test the code under different conditions. The tests are created before the code is written. The code is then developed until the tests results indicate the software functions correctly. The benefits of test driven development for you:

- Our developers are more productive. They have more time to add the functionality you want.
- Our developers create tests from the user's perspective. The resulting program is very close to the way you work.
- Our developers know immediately when they do something wrong. Their mistakes will not find their way into the end product you work with.
- The code is better structured, allowing more precise changes later. You can start using the software with confidence immediately.

1.3 Accessibility

Consistent with the Microsoft Office 2010 look and feel, accessibility is supported in the following ways:

- Navigation through the keyboard
- Keyboard shortcuts

See Using Shortcut Keys

2 Using the Smart Client

You will find that the PROLIN Smart Client is very easy to use and will improve your productivity. In this chapter you will learn the basics of using PROLIN Smart Client. In the following chapters you will explore the PROLIN Smart Client more in-depth. By going through this manual from time to time you will find that you can unlock even more functionality than is apparent at first glance.

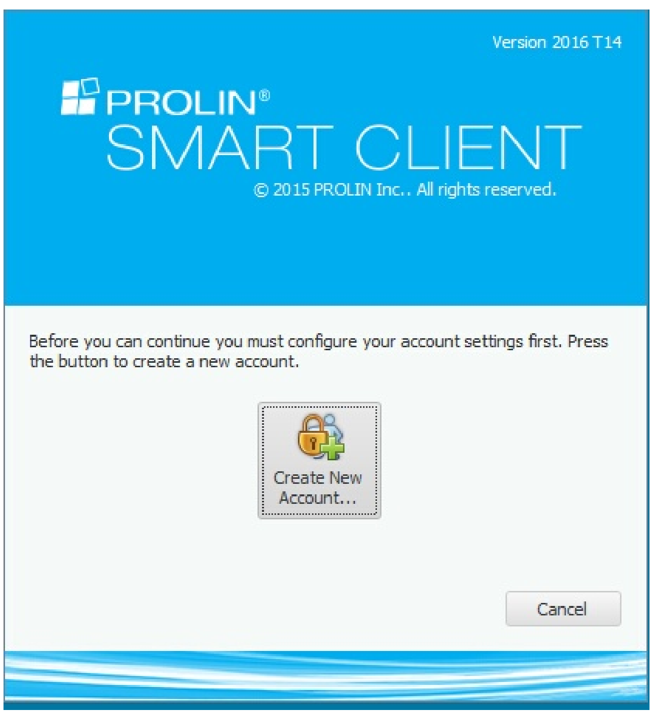
2.1 Starting the Smart Client

To start PROLIN Smart Client, do one of the following:

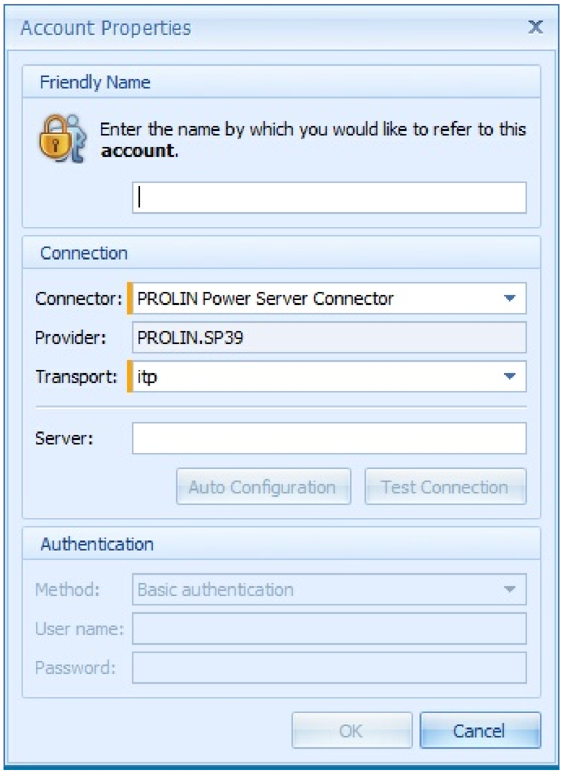
- Double click the PROLIN Smart Client icon on the desktop,

- or, in the **Start** menu point at **PROLIN, Inc.**, then point at **Service Management** and choose **PROLIN Smart Client**.

When you are starting PROLIN Smart Client for the first time, you need to setup your account first which can be done by pressing the **Create New Account...** in the shown startup screen:



In the **Account Properties** dialog you first indicate the type of connector your are using and the server name or IP address of either PROLIN Power Server or Service Desk. To verify that you entered this information correctly, press the **Test Connection** button:



The **Transport** option allows you to select a different form of communication between the client and the server. This can only be a different value than **itp** if you are using the PROLIN Connector and if you are using PROLIN Power Server 2016 or later.

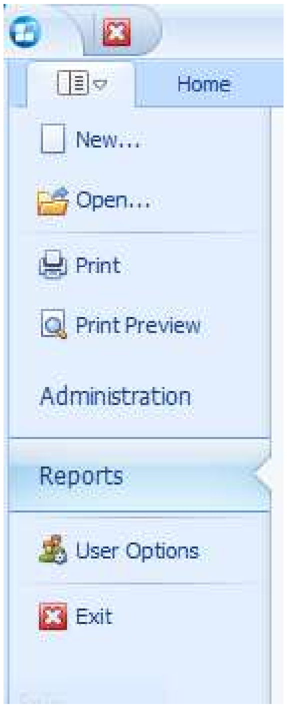
By clicking on the **Auto Configuration** button PROLIN Smart Client will try all options and suggest the one that had the best results for your specific location.

Depending on the selected connector you now need to specify the method for authentication you want to use. In general, **Basic authentication** is supported by all connectors and requires you to enter a username and a password. If you use the PROLIN Power Server connector can also make use of **Integrated Windows authentication** which allows you to sign in using your Windows credentials. Note however that this type of authentication requires that you have logged on to the Windows domain and that the server is configured properly.

This is all you need to do to use PROLIN Smart Client. Your connection information will be stored locally in a safe location. The next time you start PROLIN Smart Client, it will automatically use the saved information. The PROLIN Smart Client console will now open.

2.2 Using the Application Menu

Use the **Application** menu for many application wide functions and settings. The **Application** menu can be found left of the **Home** tab in the ribbon. The following image shows the **Application** menu.



For an explanation of the commands, follow the hyperlinks below:

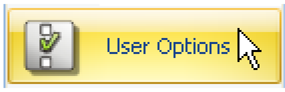
- **New**: Creating a New Item.
- **Open**: Opening An Item In A Form
- **Print**: Running Reports
- **Print Preview**: Changing The Layout Of A Report
- **Administration**: Administration Module
- **Reports**: Smart Reporting
- **User Options**: Changing User Options
- **Exit**: Closing The Smart Client

See also Parts Of The Console.

2.3 Changing User Options

Depending on your authorization settings, you may be able to change and save your user options.

To change user options, choose **User Options** from the **Application** menu.

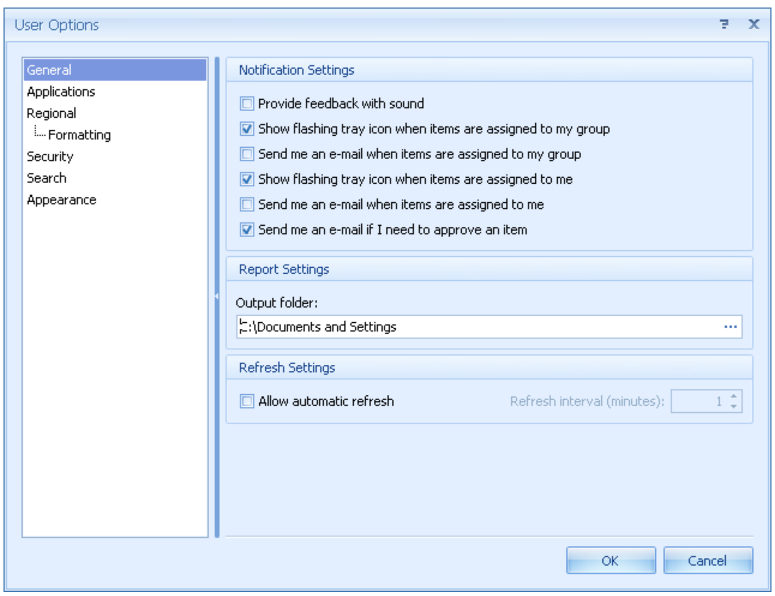


User options in the Application menu

Make sure you exit the **User Options** dialog with **OK** to save the chosen user options.

2.3.1 Notification, Report and Refresh Settings

In the General Options screen of the User Options dialog, you can choose notification, report and refresh settings.



General settings avaialble in the User Options

Notification Settings

The following settings are available:

- **Provide feedback with sound.** If selected, feedback such as warnings and error messages will be accompanied with a sound.
- **Show flashing tray icon when items are assigned to my group.** If selected, let Smart Client scan for Service Today items that are assigned to your work group. At the moment an item is newly assigned to your group, an icon in the system tray will draw your attention so you can take immediate action. This option is handy when you have PROLIN Smart Client running, but are working on other items or using other applications.
- **Send an e-mail when items are assigned to my group.** If selected, let the server scan for Service Today items that are assigned to your work group. At the moment an item is newly assigned to your group, an e-mail message will be sent to you so you can take immediate action. This option maybe handy when you are away from your desk and have immediate access to your e-mail.

- **Show flashing tray icon when items are assigned to me**. If selected, let Smart Client scan for Service Today items that are assigned to you. At the moment an item is newly assigned to you, an icon in the system tray will draw your attention so you can take immediate action. This option is handy when you have PROLIN Smart Client running, but are working on other items or using other applications.
- **Send an e-mail when items are assigned to me**. If selected, let the server scan for Service Today items that are assigned to your work group. At the moment an item is newly assigned to your group, an e-mail message will be sent to you so you can take immediate action. This option maybe handy when you are away from your desk and have immediate access to your e-mail.
- **Send me an e-mail if I need to approve an item**. If selected, let the server scan for Service Today items that require your approval. At the moment an item is saved that requires your approval an e-mail message will be sent to you so you can pay attention to the item. This option maybe handy when you are not always using PROLIN Smart Client and have immediate access to your e-mail.

Report Settings

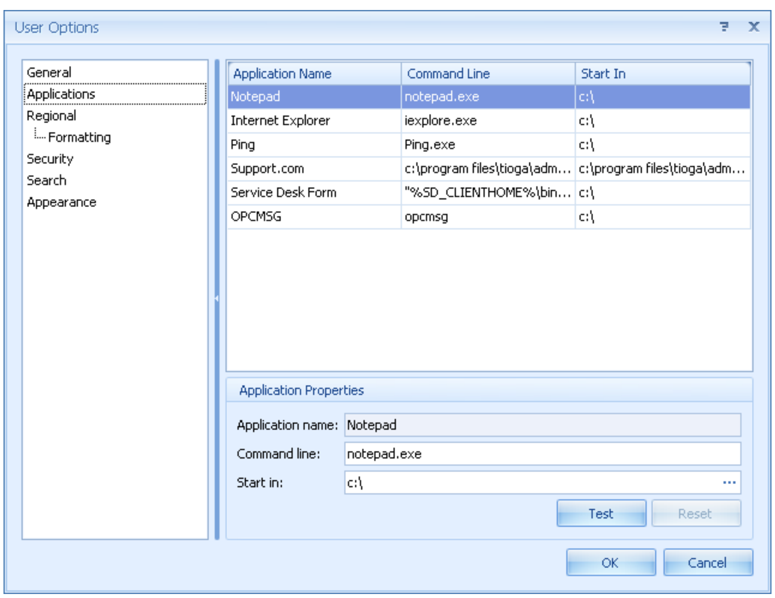
Select the location where reports are saved by clicking the browse button at the right most side of the **Output folder** field. When you save a report, you can find it in the folder you select here.

Refresh Settings

Select **Allow automatic refresh** if you want to update a view regularly. For example, some customers use this option on a large screen in the Service Desk room. However, notice that if you select a short interval in the **Refresh Interval** field this option may cause a large amount of network traffic and significantly slow down PROLIN Smart Client. Use this option with proper judgement.

2.3.2 Applications Settings

The **Applications** screen in the **User Options** dialog allows to set applications used in Smart Actions. These settings are the local settings for application called for by Smart Actions. With proper local settings, Smart Actions can be defined centrally and used everywhere.



Local options for applications in smart actions

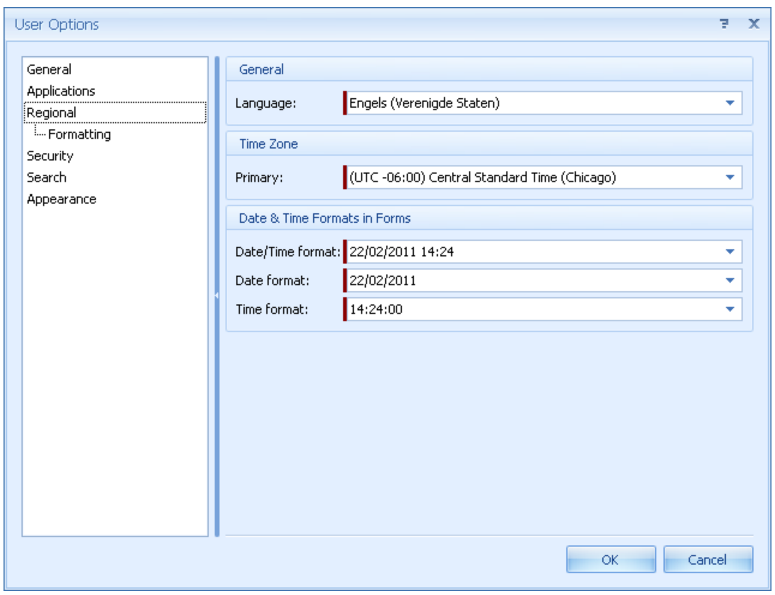
To set the properties of an application, do the following:

1. Select an application from the application list at the top.
2. Enter a name, command line and working directory in the **Application Properties** section at the bottom.
3. Click **Test**.

- Application name should be the same as used in the Smart Actions.
- The command line must only contain the name of the executable.
- The command line shall not contain parameters as these will be provided by the action.
- The command line may contain environment variables in the application's path.

2.3.3 Selecting the Time Zone, Language and Date Format

The regional settings are concerned with formatting values in forms and views.



Time zone settings in Reginal screen

The language setting determines what language is used for labels, buttons, field names etc. If a choice is available, it will be shown in the **Language** list. However, the language must be made available through translation and distribution of files. Depending on your company, other languages than the standard English language are available.

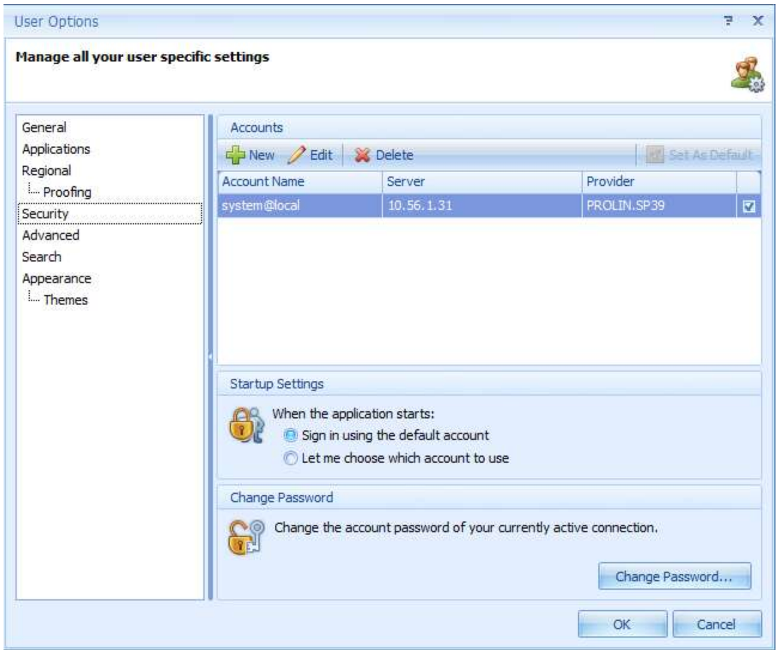
To view the time values correctly in Views and Forms, you must set the time zone in which you work. Every date and time value in PROLIN Smart Client is stored in Greenwich Mean Time (GMT) and shown to you in the time zone you select in the user options. You can choose the correct time zone from the **Primary** time zone list.

The date and time formats make it easier to quickly read dates. Choose a format that you are most comfortable with. What formats are available depends on the language of the operating system settings you use. For date formatting in views, see Changing View Options.

2.3.4 Adding and Editing Login Accounts

You find settings for your login accounts and password in the **Security** screen of the **User Options** dialog.

A first account will be made when you first start up PROLIN Smart Client. After the first login, you can add accounts to login to alternative servers. PROLIN Smart Client will automatically adjust to the right service pack needed to log on to the server used in the account.



User Accounts

To add an account, click **New**.

To edit account setting, select an account in the **Accounts** list and click **Edit**.

User Accounts Dialog

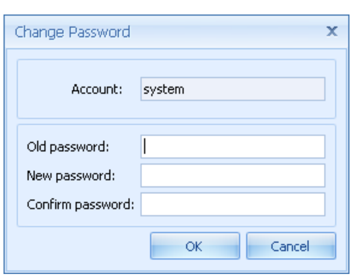
The **Transport** option allows you to select a different form of communication between the client and the server. This can only be a different value than **itp** if you are using the PROLIN Connector and if you are using PROLIN Power Server 2016 or later.

By clicking on the **Auto Configuration** button PROLIN Smart Client will try all options and suggest the one that had the best results for your specific location.

NOTE With the **Account Properties** dialog you do not create an account on the server. Ask your system administrator for the correct account information. Changing the password in the **Account Properties** dialog has no use if the password is not known on the server. For correctly changing your password, see below.

To set an account to default, select an account in the **Accounts** list and click **Set As Default**. The default account change will take effect the next time you start PROLIN Smart Client. If log on with the new account fails, there is no option to change accounts and start up may then take longer. Make sure you change to an account that will work the next time you start up. For example, test the connection first before you set the account as default. To test a connection, select an account in the **Accounts** list and click **Edit**. In the **Accounts Properties** dialog, click **Test Connection**.

To change the password of the currently active account, click **Change Password** and fill in the correct and new information in the **Change Password** dialog. Using this function makes sure the password is updated on the server.



The change password dialog

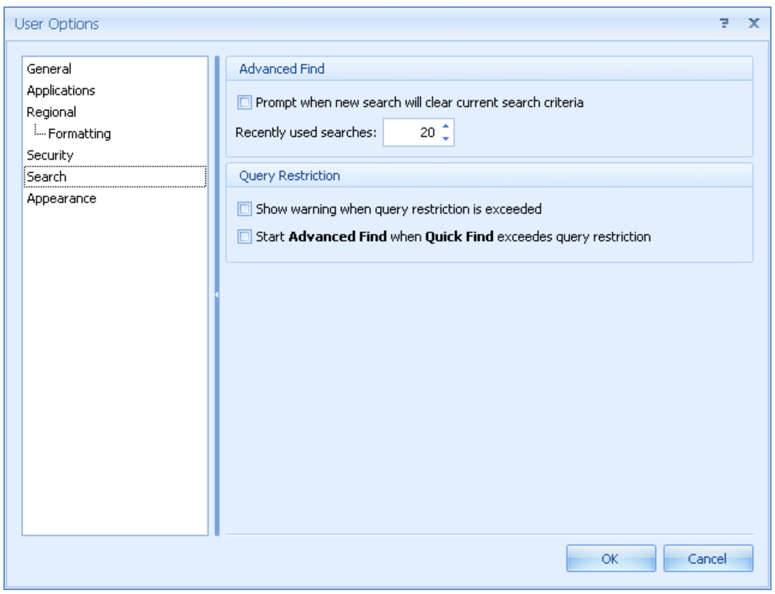
2.3.5 Search Settings

Even though PROLIN Smart Client is optimized for performance, still searches use a lot of resources and may have considerable impact on how you appreciate performance. The search settings will have an impact how quickly PROLIN Smart Client responds. Settings that may cause large search results will give you complete information. Settings that may cause small search results will give you faster results. Choose your search settings wisely.

You find the following settings in the **Search** screen of the **User Options** dialog.

Prompt when new search will clear current search criteria . PROLIN Smart Client optimizes searches by reusing search criteria. If search criteria cannot be reused, you will notice a temporary reduction of performance until optimizations are found again. A notification when search criteria are cleared, helps you make use of optimizations by allowing you to choose different search criteria.

Recently used searches . Recently used searches are used to find optimizations in searches. More searches kept will result in better optimizations, but also in larger cache sizes.



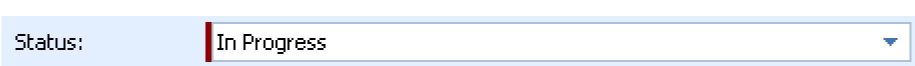
Search settings in the User Options dialog

Show warning when query restriction is exceeded . A query restriction may be set on your account by the system administrator. The query restriction limits the amount of items returned in a search result. A low number in the query restriction helps reduce network traffic and resource use, but may give the impression that PROLIN Smart Client does not return all information needed. A warning if the query restriction is exceeded thus helps validate the search result.

Start Advanced Find when Quick Find exceeds query restriction . Query restrictions also apply to Quick Finds. Large amounts of items in a Quick Find result are cumbersome to use. Using Advanced Find with Quick Find will thus help you find the right choice quickly.

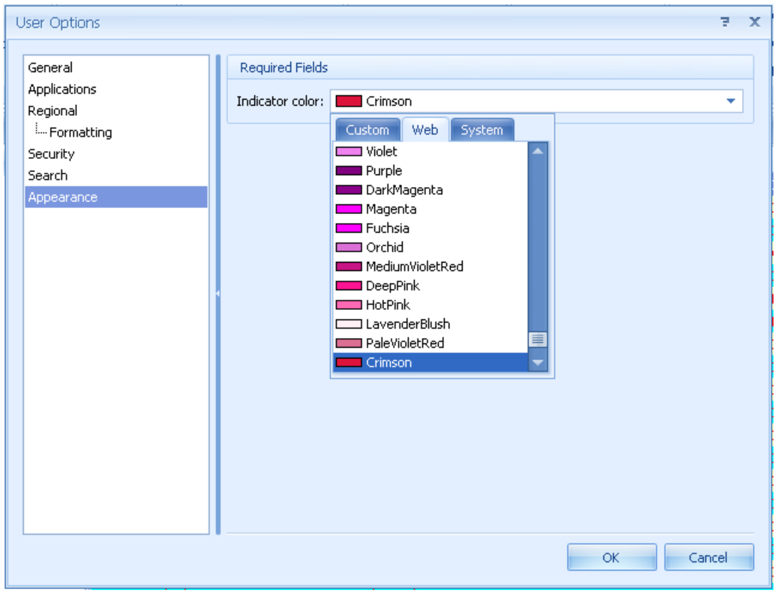
2.3.6 Changing Appearance

Changing the appearance of PROLIN Smart Client will attract better attention to the required fields.



Appearance of a required field

At the side of the label you will see a bar indicating the field is required, make sure these fields have a value. The field may be required because ITIL processes make it required, or because your company's processes make it a required field. Before you can save and close a form, all required fields must have a value. A field may become required after giving another field a specific value. For example, if you set the **Status** field of a Service Call to a *Closed* value, the **Closure** code becomes required. With the **Closure** code you provide the reason why the Service Call is closed. Sometimes required fields may be obscured for some reason, make them as clear for you as possible.



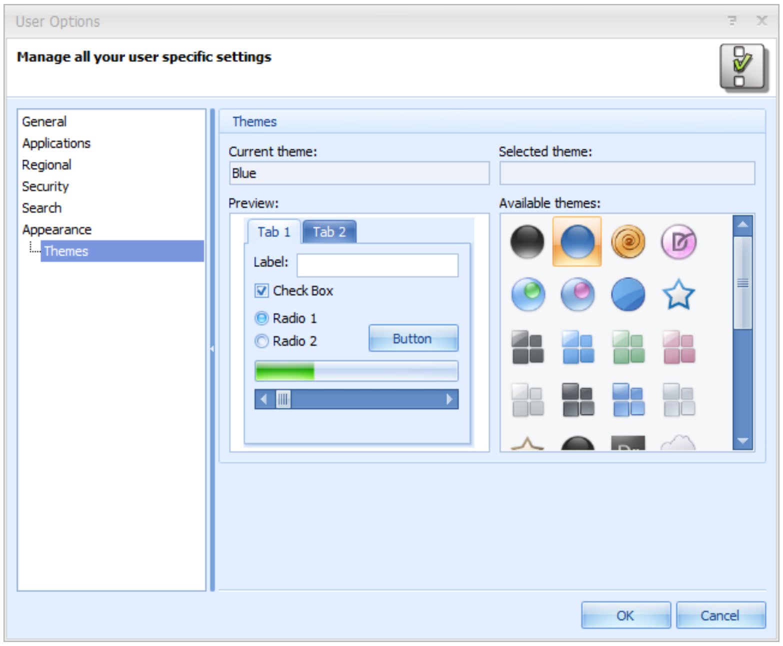
Choose color for the required field

To choose a better appealing color for required fields, open the **Indicator color** list. From the **Indicator color** list, choose a color. In the **Custom** tab you can define your own color, or choose from the predefined colors. In the **Web** tab you can choose a large number of predefined colors by name. In the **System** tab you can choose from predefined system colors. The system colors are colors as they are used in forms and buttons of the operating system.

The appearance settings are one of the many accessibility features in PROLIN Smart Client, see also:

- Required Fields
- Accessibility
- Using Shortcut Keys

Specify a theme to modify the look & feel of PROLIN Smart Client

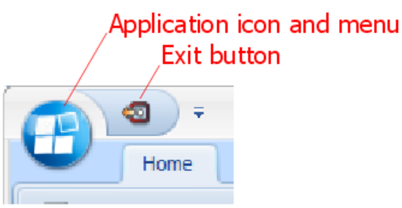


By choosing one of the themes you can modify the way the application looks like.

2.4 Closing the Smart Client

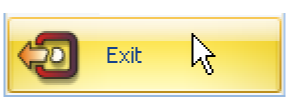
To close the console, do one of the following:

- Click the close window (cross) button in the upper right hand corner of the console.
- Click the **Exit** button.



Application Exit from the Quick Access bar

- Choose **Exit** from the **Application** menu.



Application exit from the application menu

- Press **Alt + F4** on the keyboard.
- Press **Alt**, now different key options are shown.
  - Press **E** to exit the Smart Client, or
  - Press **A** to open the application menu. In the application menu press **E** to exit the Smart Client.

2.5 When Starting the Client Fails

When starting PROLIN Smart Client fails, the following may help.

- The message "Access denied: incorrect name or password. Click **Sign In** to retry to log on" appears.
  You entered the wrong user name or password. Find the correct user name and password and try again.
- The message "Failed to connect with server. Check that the application server is running." appears.
  This problem may have the following causes:
  1. You are trying to connect to a server where no Service Desk server is running. Contact the system administrator to find the correct server.
  2. You are trying to connect to the correct server, but the Service Desk server is not running. Contact the system administrator to make sure the Service Desk is running.
  3. You are trying to connect to the correct server, but have not provided the correct port number. Depending on the configuration of the Service Desk server the standard or an alternative port number is chosen for communication. If an alternative port number is chosen, the port number must be provided with the server name. In the login screen enter the server name as follows:
     - If the standard port is used, enter the server name or the IP address in the **Server** field.
     - If an alternative port is used, enter the server name, followed by a colon, followed by the port number (<server name>:<port number>) in the **Server** field.
  4. You are trying to connect to the correct server with a running Service Desk server. In this case, a firewall may prevent connection to the Service Desk server. Contact your system administrator to create an exception for PROLIN Smart Client in your firewall.

2.6 Updating the Client

When there is a new version available of PROLIN Smart Client it can be downloaded via the website: http://products.prolin.com.

A newer version can always be installed over the older version, there is no need to do an uninstall first.

2.7 Changing Supported Service Packs

When PROLIN Smart Client starts, the software checks the service pack of the Service Desk server. If the service pack of the Service Desk server does not match any of the service pack support files already available on your computer, the service pack configuration screen will appear at start up.

If you do not want to install extra Service Desk service pack support on the computer you work on:

- Click **Back** to return to the log on screen and choose a different server,
- Click **Cancel** to quit the PROLIN Smart Client start up.

Click **Continue** to download and install the required Service Desk service pack support files. After the service pack support files are installed the log-on screen will be shown again. Enter the information and click **Start**.

The Service Desk service pack support files are installed only once. Once the necessary service pack support files are installed on the computer, PROLIN Smart Client will automatically detect the service pack of the server you connect to and switch to the correct service pack support files.

If the Service Desk server has a service pack not currently supported by PROLIN Smart Client, then please contact PROLIN or your PROLIN partner to request support for your particular service pack. If an unsupported service pack is detected, a screen notifying the user appears.

2.8 Using the Client Behind a Firewall

PROLIN Smart Client needs network access to the Service Desk server. When your computer is protected by a firewall, you must create an exception for PROLIN Smart Client or allow the use of Service Desk client communication ports.

The PROLIN Smart Client application is found in the location that is given during installation and is called smc.exe (default is C:\Program Files\PROLIN Smart Client\smc.exe).

To learn how to create an exception in your firewall, read the documentation of your firewall. For example, to make an exception for PROLIN Smart Client in the Windows firewall, do the following:

1. Log on to the computer as the administrator.
2. In the **Start** menu, click **Control Panel**.
3. Click **Security Center** and then click **Windows Firewall**.
4. In the **Exceptions** tab page of the **Windows Firewall** dialog, click **Add Application**.
5. In the **Add Application** dialog, click **Browse**.
6. In the **Browse** dialog, navigate to the PROLIN Smart Client executable as described above.
7. Select *smc.exe* and click **Open**.
8. Select *smc.exe* in the application list and click **OK**.
9. Close the firewall and the Control Panel.

Because the application is stored in the user folders of the computer, an exception must be created for every user that uses PROLIN Smart Client on the same computer.

When you create an exception for the application, you do not need to create an exception for the ports used. However, if you create and exception for the used ports you do not have to create an exception for PROLIN Smart Client for each user.

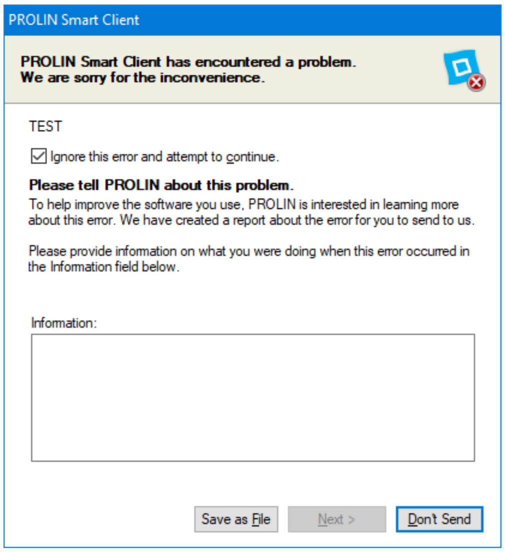
2.9 Support

The installation website provides the updates of the software automatically. Updates of PROLIN Smart Client software will be delivered regularly. See Updating The Client to learn how to update PROLIN Smart Client.

If you have comments, suggestions or requests. Contact your support group or send an e-mail message to support@prolin.com

2.10 Help Improve PROLIN Smart Client

The best way to help improve PROLIN Smart Client is to use it. PROLIN Smart Client will make your life easier at work. However, there may be times when you encounter issues the development team would like to know more about.



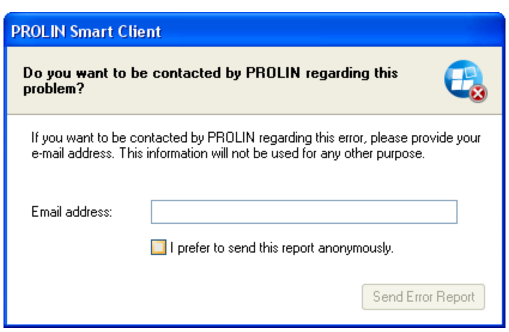
These kind of problems occur infrequently and so PROLIN would like your help.

If you want to make sure your information stays correct, make sure the **Ignore the error and attempt to continue** option is not selected. This should only be needed if you started an operation that involves saving information.

Please provide as much info as you can in the information field concerning the steps that led up to this error message.

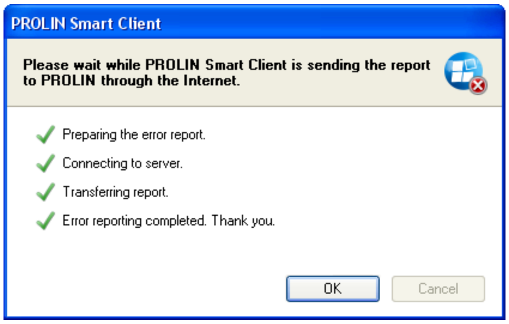
If you have no direct access to the internet, then click **Save as File**. You can then save the error report as a file and send the file to support@prolin.com.

You can help improve PROLIN Smart Client by simply sending the problem report and click **Send Error Report**.



Provid your email with the error report

PROLIN would appreciate the opportunity to contact you about the error. If you want to be contacted by PROLIN, then please provide your e-mail address. If you do not want to provide your e-mail address for any reason, select **I prefer to send this report anonymously**. Click **Send Error Report**.



The message is sent

Thank you for your cooperation and we apologize for any inconvenience.

3 Navigating the Smart Client

The amount of information you can access through PROLIN Smart Client may be overwhelming. In this chapter you will learn how to find your way through the user interface. In the next chapter you will learn how to perform basic tasks.

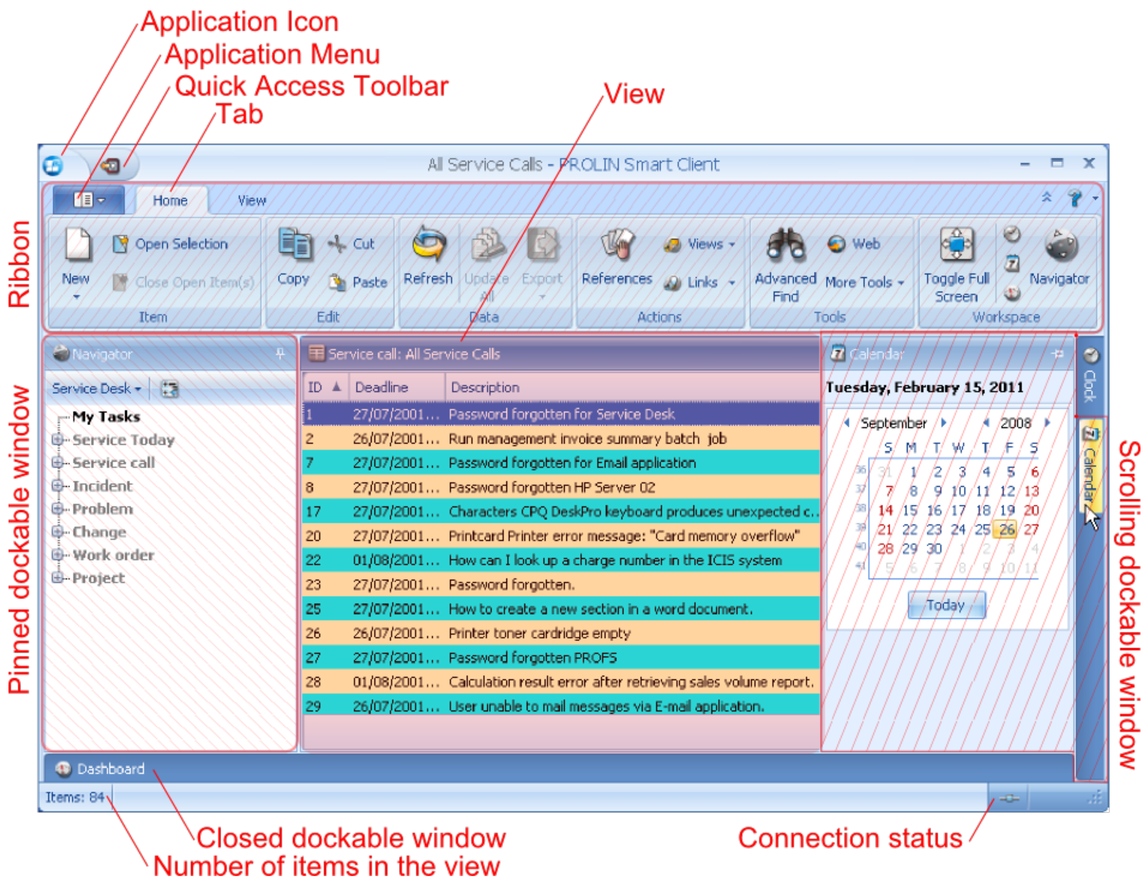
3.1 Parts of the Console

When you start PROLIN Smart Client the console is automatically shown. In PROLIN Smart Client you do your work by analyzing, finding and updating information in items. The items may be Service Calls, Incidents, Problems and many more. While working on the items in the console your work is part of the IT processes as they are defined in your organization. PROLIN Smart Client helps you adhere to the defined processes and procedures. The console is the starting point of your work.

The central part of the console is the view window. The view window contains a view showing items. Above the view window you will find the ribbon and the application icon. The ribbon contains tabs and each tab contains commands. There are two tabs in the ribbon. The **Home** tab contains general commands such as **Print** and **Advanced Find.** The **View** tab contains commands to configure the view.

To the left, right and bottom of the view window you will find action windows. These action windows contain tools you may regularly need while working with PROLIN Smart Client.

The below image names the parts of the console.



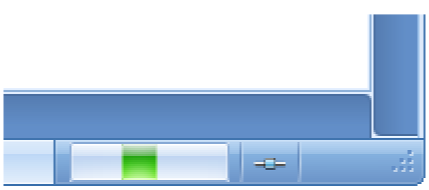
Parts of the Console

Some parts of the console have a standard place:

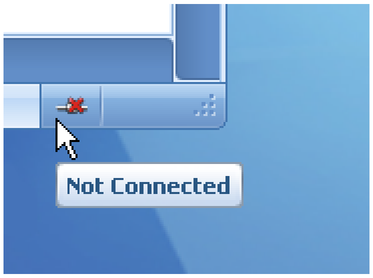
- The view window will always be in the middle of the console.
- The scrolling action windows are always to the outside of the pinned action windows.

3.1.1 Checking the Connection

The lower right hand corner shows the status of the connection. PROLIN Smart Client may have to retrieve a large amount of information and thus may be working for some time. The lower right hand corner shows you what is going on.

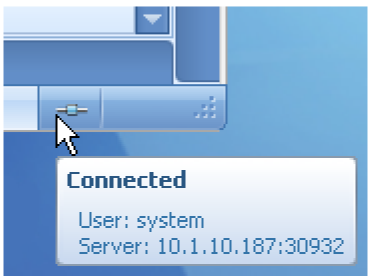

Lower right hand corner when working

A moving green indicator shows that PROLIN Smart Client is working. Please wait.



Lower right hand corner if connection is lost

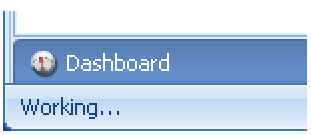
When the green indicator stopped and the connection indicator is red, then the connection is lost. PROLIN Smart Client will try to reconnect to the server again. Once the connection is established, the connection indicator returns to normal. The connection tool tip will show the user's name and the name of the server PROLIN Smart Client is connected to.



Lower right hand corner when connection is good

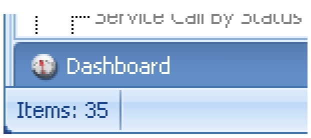
3.1.2 Counting Items in the View

The lower left hand corner shows how many items are shown in the view and how many items are selected. PROLIN Smart Client may have to retrieve a large amount of information and thus may be working for some time. The lower left hand corner shows you what is going on.



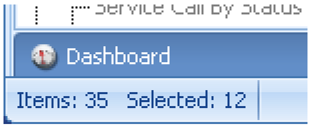
The lower left hand corner when working

The text Working indicates that PROLIN Smart Client is searching for items. Please wait.



The lower left hand corner when nothing is selected

The search resulted in items. Now the lower left hand corner indicates the number of items shown in the view. When the number of items in the view is larger than fit on in the view, scroll bars will be shown. The number of items in the view will not exceed the query restriction set for your account.



The lower left hand corner with twelve items selected

When you select more than one item, the lower left hand corner will show the number of items you selected. The selection may exceed the height of the view, still the lower left hand corner will conveniently show the number selected.

3.2 Customizing the Console

You can customize the console in various ways. Do any of the following.

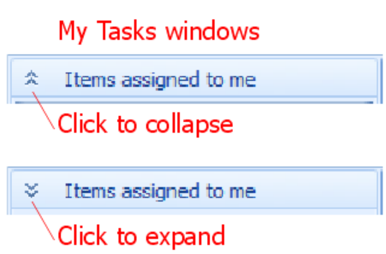
- Changing The MyTasks View
- Minimizing And Maximizing The Ribbon
- Moving Action Windows
- Customizing The Navigator
- Maximizing The Workspace
- Maximizing The Form

Customizations are saved upon closing the console.

3.2.1 Changing the MyTasks View

The MyTasks view is a great view to start your day. All items that are assigned to you or to your group, and all approval tasks that you have are shown in one view. You may not have approval tasks or you may not be interested in the items assigned to your group. So, you may want to change the MyTasks view.

To minimize, collapse, the windows within the MyTasks view click on the double V button in the upper left hand corner of the window you want to collapse.



My Tasks collapsing and expanding

To resize the windows in the MyTasks view, drag the splitter until the window has the right size.


Splitter

3.2.2 Minimizing and Maximizing the Ribbon

In PROLIN Smart Client you will work with many items and may want to see as many items and details as possible. To see as many details as possible, scroll up action windows and minimize the ribbon. For easy access to settings, maximize the ribbon.

To minimize and maximize the ribbon do the following:

- To minimize the ribbon, press **Ctrl-F1**.
- To maximize the ribbon, press **Ctrl-F1**.

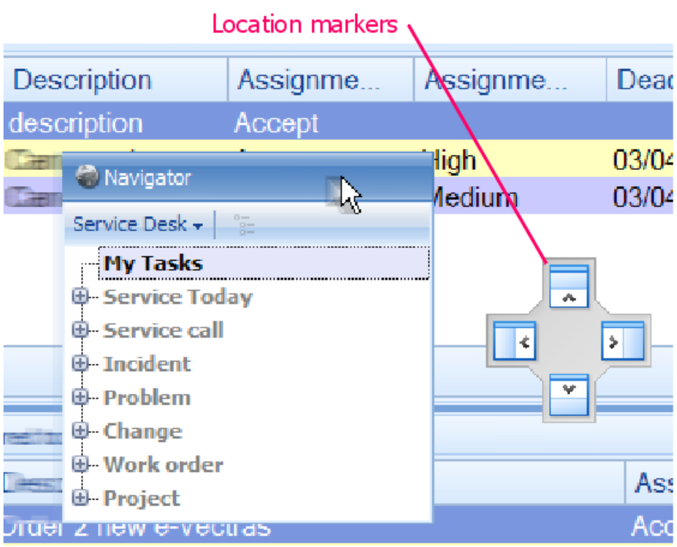
When minimized, the ribbon will use very little screen space. To use the commands in the ribbon, click on the ribbon tab and then click the command. After using one of the commands in the ribbon, the ribbon will automatically minimize again.

3.2.3 Moving Action Windows

Action windows can be moved around. Changing the location of action windows allows you to adjust the console (or form) to your way of working.

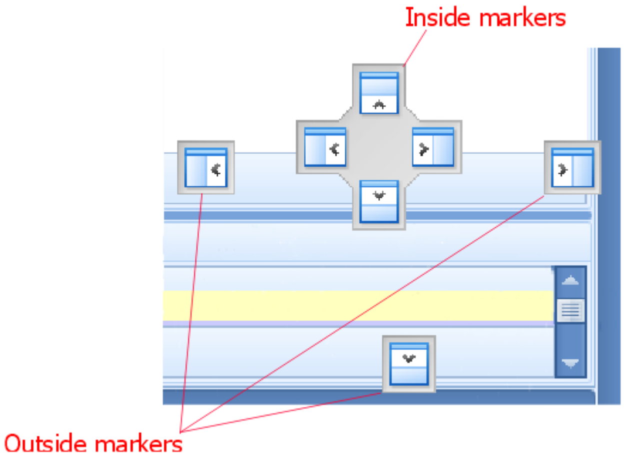
To move an action window, do the following:

1. Point the mouse at the name of the action window, the window scrolls open.
2. Pin down the action window. While you move the mouse away, the window stays open.
3. Click and hold the title bar of the action window and drag the window to the location you want the window to be. As you near the location where you can drop the window, location markers are shown.
4. Drop the action window on the location marker that indicates the location you want the window to be. When you move the mouse over a location marker, the location where the window will be placed is indicated with a blue shaded area.
5. Unpin the action window to allow the window to scroll.



Moving dockable window with location markers

When you drag the action windows around, location markers are shown on the console. These location markers indicate locations where you may drop a window.



Markers for inside and outside locations

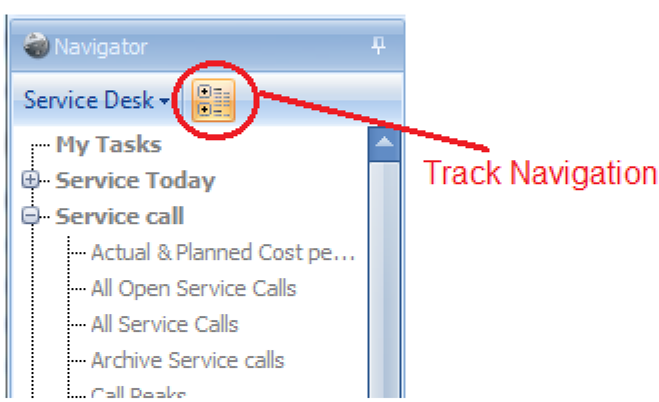
The inside markers indicate locations on the inside section of the console, for example on the outside of the action window. The outside markers indicate locations on the outside of the console. When you move the action window over an already docked window, the location markers relative to the docked window will appear. With moving around and using the right location marker you can easily place the action windows exactly where you want them.

3.2.4 Customizing the Navigator

To customize the grouping in the Navigator, click **Customize Groups** at the top of the Navigator.

It is possible to choose how you want the Navigator to behave while you are changing views that you've opened in several tabs.

1. If the "Track Navigation" option is off, the Navigator remains in the position it was after adding the last view to the tabbed views.
2. If the "Track Navigation" option is on, the Navigator will show the position in the navigation tree of the view that is currently active.



Location of Track Navigation Button

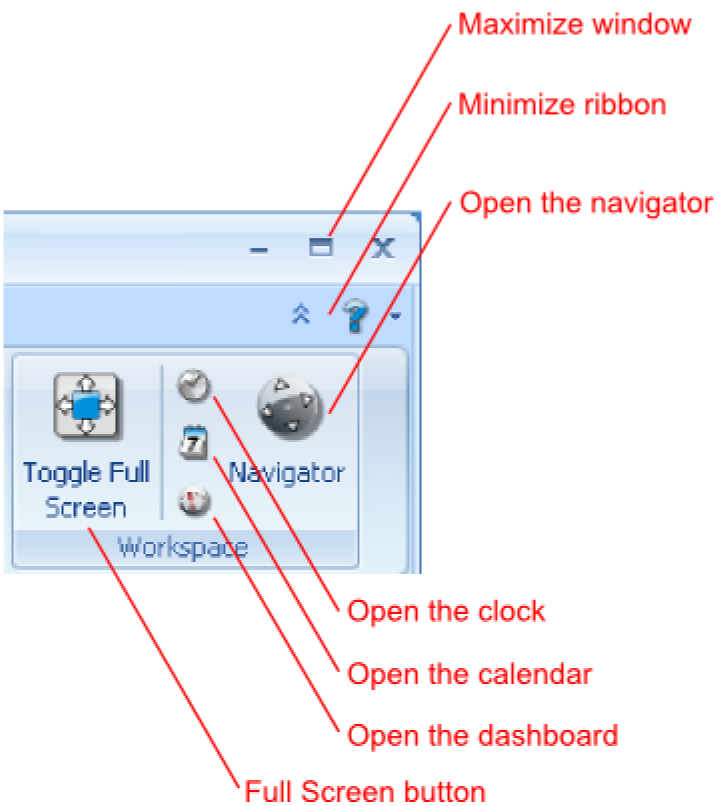
3.2.5 Maximizing the Workspace

Every once in a while you may want to maximize your workspace. The columns in a table view cannot get wide enough. You would like to see more of the navigation view in an Explorer view. Or, you look at a chart with small details and you want to make a good print of the chart.

To enlarge your workspace, you can do the following:

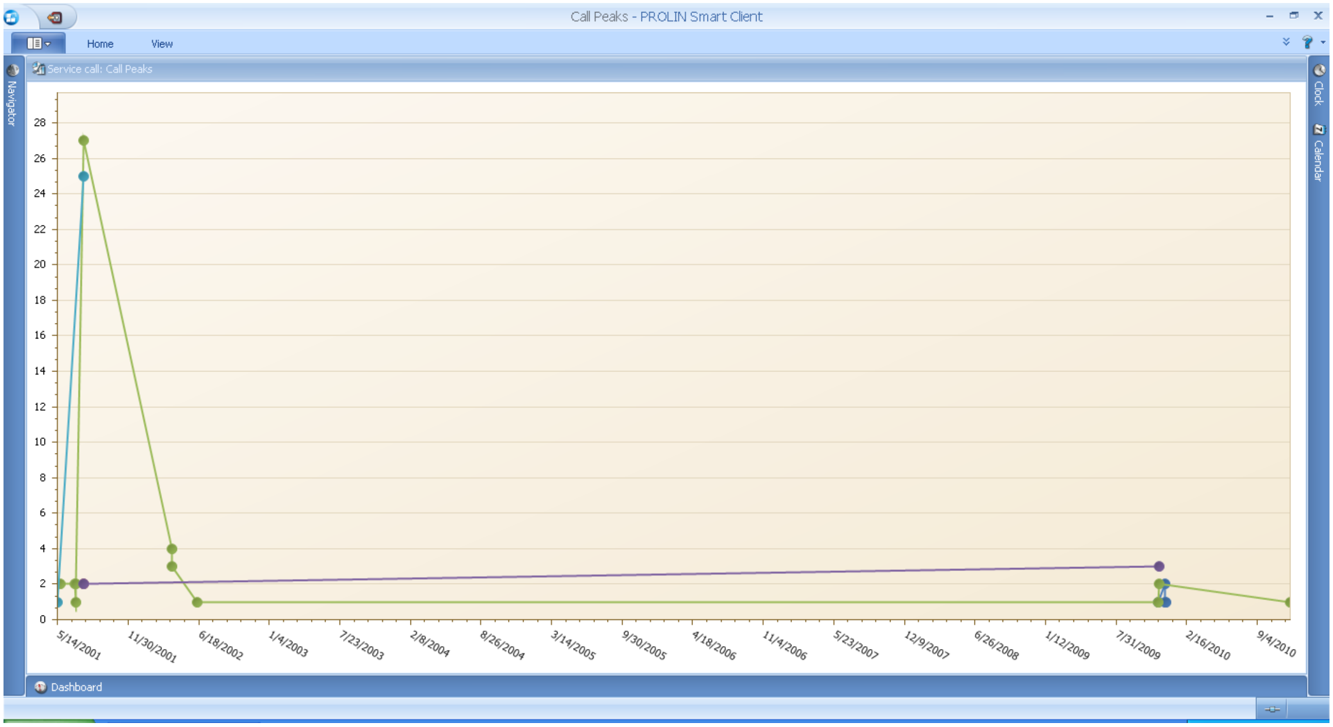
- Close all action windows, if they are open. For opening and closing action windows, see Using Action Windows.
- Minimize the ribbon. To minimize the ribbon, click the **Minimize Ribbon** button at the far right hand of the ribbon tabs.
- Maximize the window. To maximize the window, click the **Maximize Window** button in the upper right hand corner of the window. Alternatively, press ***ALT+SPACE*** on the keyboard to open the system menu and choose **Maximize**.

To maximize the workspace with one click, in the **Workspace** group in the **Home** tab, click **Toggle Full Screen**. The **Toggle Full Screen** command closes pinned action windows, minimizes the ribbon and maximizes the window.



Workspace group

When the ribbon is minimized, the **Minimize Ribbon** button is replaced with the **Maximize Ribbon** button.



A full screen window

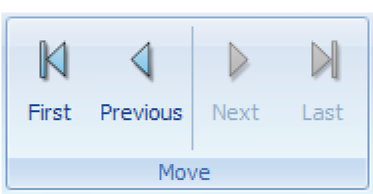
To take the PROLIN Smart Client window out of full screen mode, click the **Home** tab label to open the **Home** tab and then click **Toggle Full Screen**. Alternatively, click the **Maximize Ribbon** button and then click **Toggle Full Screen** in the **Home** tab.

3.2.6 Maximizing the Form

In a form the fields in the main page or tab page may not be visible. However, you want to have as good an overview as you can and still navigate from item to item in the form.

To maximize the space available for the form, do the following:

1. Open the form.



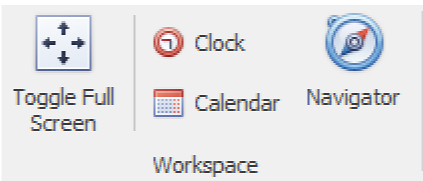
The First, Previous, Next and Last commands

2. Minimize the ribbon. To minimize the ribbon, press **Ctrl-F1**. See also Minimizing And Maximizing The Ribbon.
3. Click the **Maximize** button in the upper right hand corner of the form, or press **Alt** + **SPACE** to open the form's system menu and select **Maximize**.

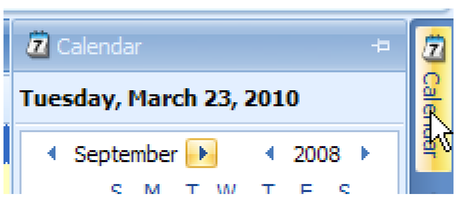
3.3 Using Action Windows

Action windows contain tools that you may need regularly while working with PROLIN Smart Client. While PROLIN develops the PROLIN Smart Client, more tools that reside in action windows may become available. These tools may be created by PROLIN, PROLIN partners or third party providers. Some tools are required for easily finding information such as the *Navigator* , other tools may just make working more enjoyable. Depending on how you use the tools, you may want to scroll the action window, pin it down or close the window.

To open or close a action window, click the button of the action window in the **Workspace** group on the **Home** tab.

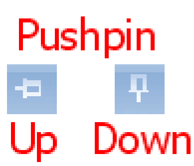


Alternatively, to open and close the action window, move the mouse over the name of the action window. The window scrolls open. When you leave the action window and work on another part of the console or form, the action window will close.



Open dockable window

In case you often need the tool in a action window, you may want to have the action window open all the time. To keep the action window open, open the window by moving the mouse over the name of the action window and click the pushpin button. A horizontal pushpin means the action windows scrolls open and close. A vertical pushpin means the action window is pinned down.



Pushpin states

To remove a action window from the console or form, click the close window (cross) button in the window's upper right hand corner. The standard action windows will stay in the view or form. You cannot remove the navigator, calendar, clock and dashboard from the console nor can you remove the attachments window from the form.

3.4 Parts of a View

Views provide an overview of the items. The items may be Service Calls, Problems, Changes etc. Different views are available:

- MyTasks view. The My Tasks view shows all tasks and items that are assigned to you.
- Service Today view. The Service Today view shows all items that can be assigned.
- Table view. The Table view shows items in a list.

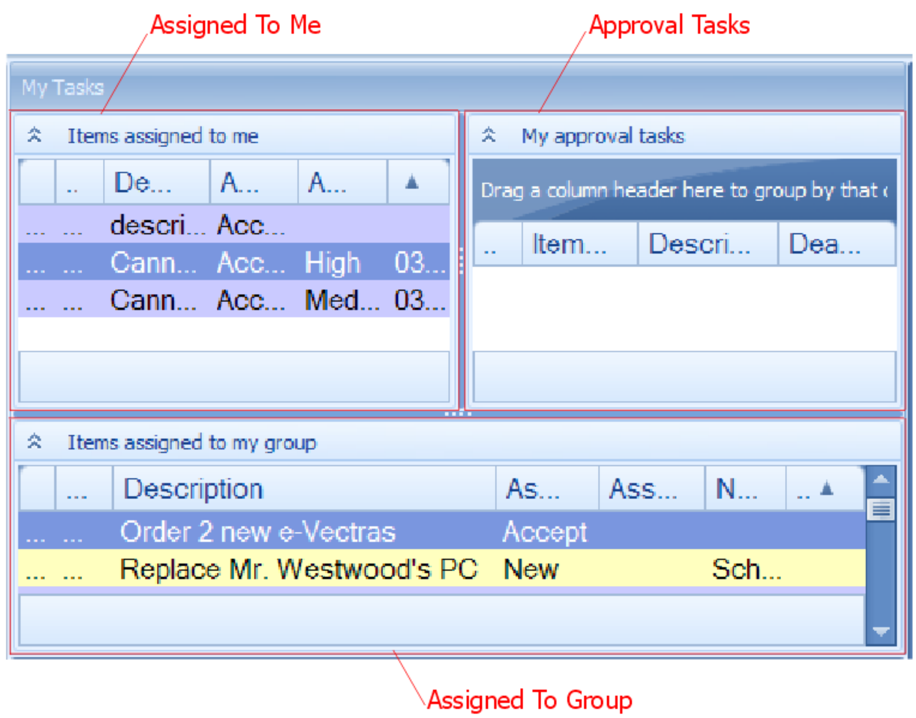
- Explorer view. The Explorer view provides for easy navigation through the records that may be shown in a table view.
- Tree View. The Tree view shows items in a hierarchical tree structure.
- Chart view. The Chart view shows aggregated information in a picture.
- Configuration Item Structure view. The Configuration Item Structure view shows configuration items and their relations. Different layouts of the view can be used to visualize relations between CIs.
- Scheduler view. The scheduler view shows Projects, Changes and Work Orders in a project format.

See also: Finding And Opening A View

3.4.1 The My Tasks View

The My Tasks view shows all tasks and items that are assigned to you. The My Tasks view is a perfect starting point of your day. See Working With My Tasks.

The MyTasks view has the following parts:

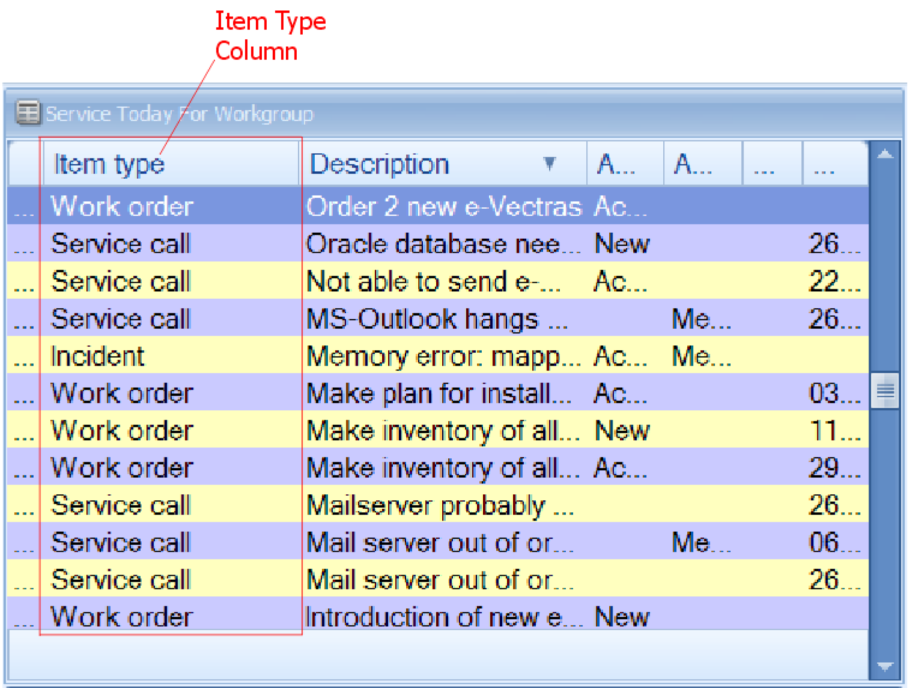


Parts of MyTasks View

3.4.2 The Service Today View

The Service Today view shows all items that can be assigned. The item types shown can be assigned to a Person or a Workgroup, these items are Service Calls, Incidents, Problems, Changes and Work Orders.

The Service Today view is either a table view or an explorer view that shows more than one item type. You will see the **Item Type** column only in the Service Today view. The **Item Type** column shows you which type the item is. When you open an item from the Service Today view, the system opens the item in a form appropriate for that item. A Work Order will open in a Work Order form and an Incident will open in an Incident form. You can not change the Item Type field of the items. See [Working With Service Today](#).

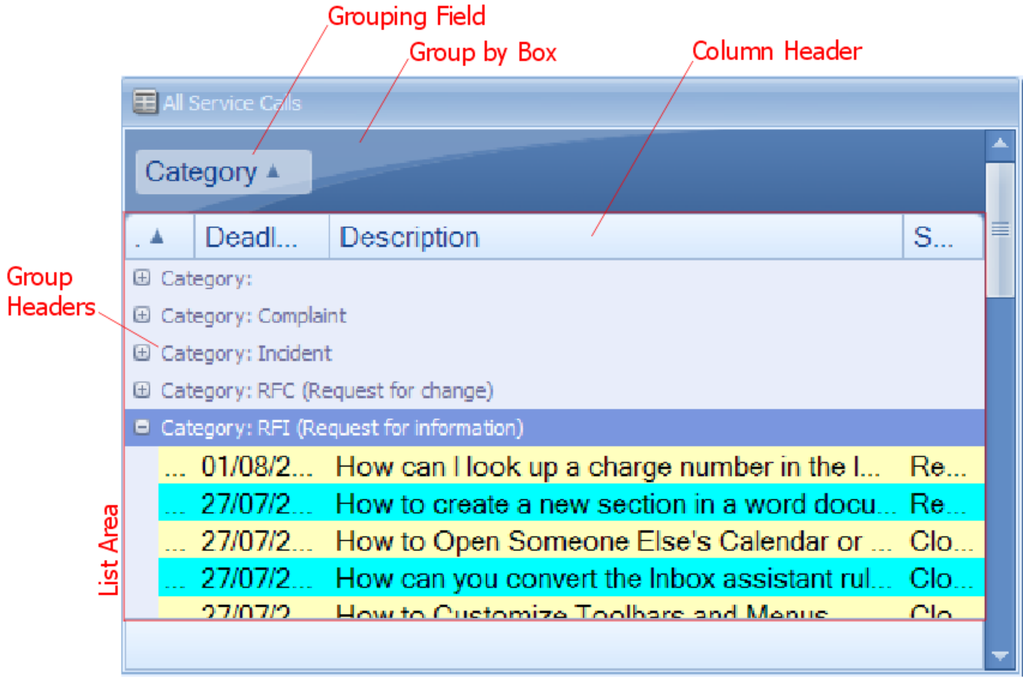


Parts of Service Today View

3.4.3 The Table View

Table views show items in a list. You use table views to find items, and see the main information of the item. To find and change details of the item, you open the item in a form. The table view is the common view used to open items in forms. Table views can be part of other views such as the My Task View and the Explorer view. See [Filtering Items In A Table View](#).

The table view has the following parts:

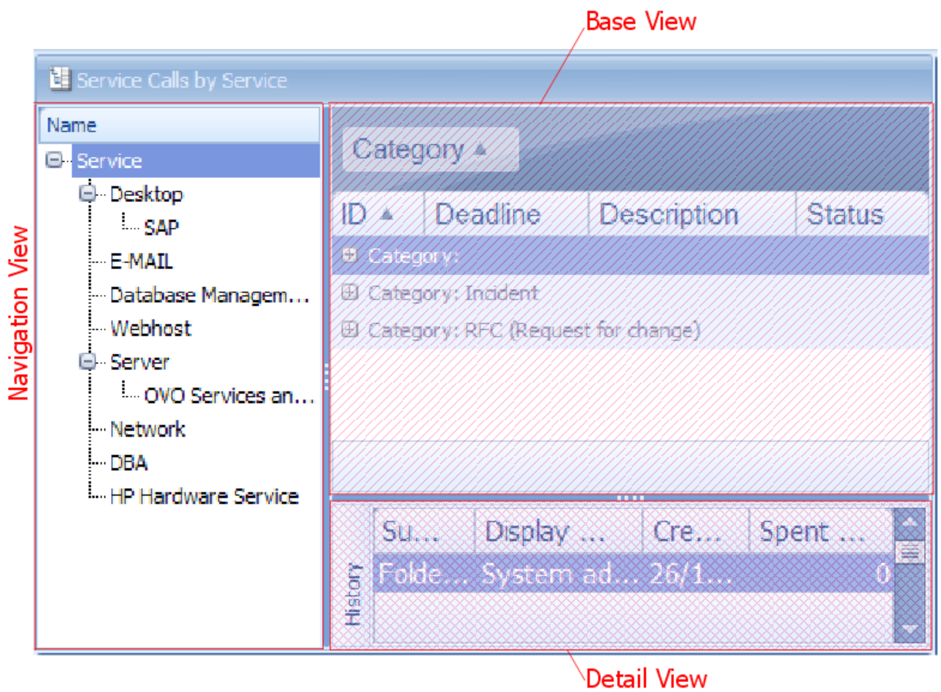


Parts of The Table View

3.4.4 The Explorer View

An explorer view provides for easy navigation through the records that may be shown in a table view or chart. In an Explorer view you can navigate through items based on the values of different fields. The field value selected in the navigation view filters the items in the base view. The items in the detail views are items that have a relation to the item selected in the base view. See Finding Items In An Explorer View.

The explorer view has the following parts:



Parts of The Explorer

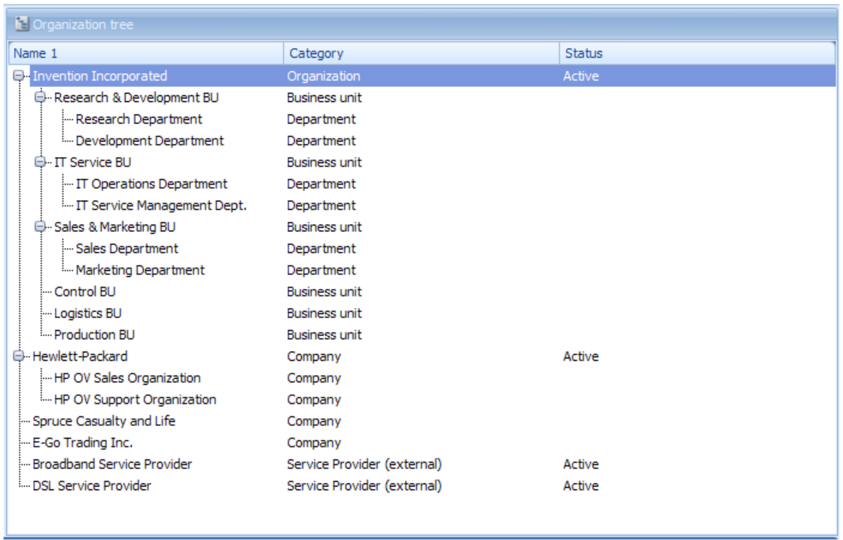
3.4.5 The Tree View

A tree view shows items in a hierarchical tree structure. Just like a table view, the tree view shows details of selected fields. The tree allows easy navigation of the items.

Tree views show information in a way that resembles a tree. In a tree there is a root and from this root grow one or more branches. The branches may have smaller branches and so on. If we take an organization as an example, the root may be the company. The company at the root may branch out in divisions. The divisions may branch out in regions, The regions may branch out in departments. Of course, how a company is structured depends on the organizational style of the company. Each entry in a tree is called a node. In the example, the company is the root node and the departments are the end nodes. End nodes do not have further branches.

See also Navigating Trees.

The following figure shows an example Tree view.



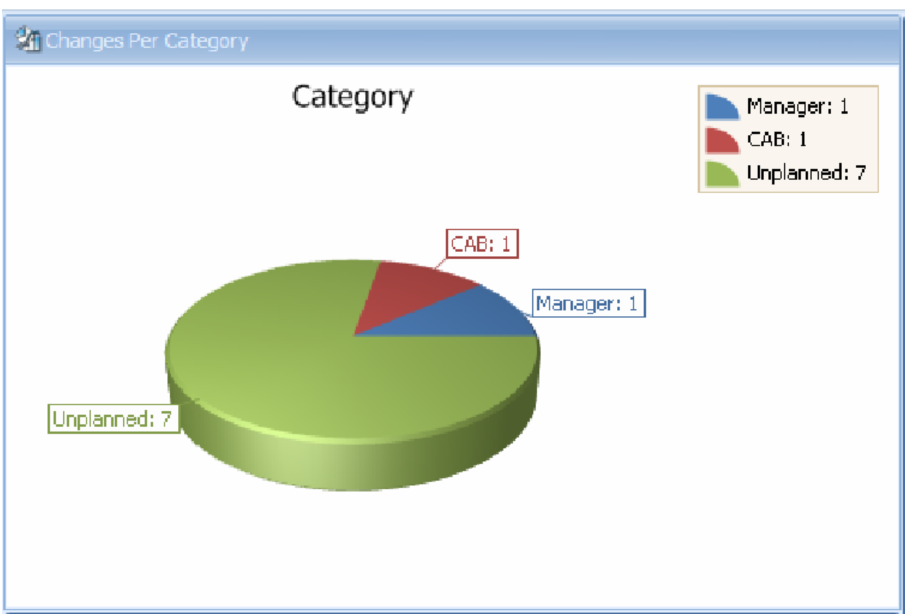
Name 1	Category	Status
Invention Incorporated	Organization	Active
Research & Development BU	Business unit	
Research Department	Department	
Development Department	Department	
IT Service BU	Business unit	
IT Operations Department	Department	
IT Service Management Dept.	Department	
Sales & Marketing BU	Business unit	
Sales Department	Department	
Marketing Department	Department	
Control BU	Business unit	
Logistics BU	Business unit	
Production BU	Business unit	
Hewlett-Packard	Company	Active
HP OV Sales Organization	Company	
HP OV Support Organization	Company	
Spruce Casualty and Life	Company	
E-Go Trading Inc.	Company	
Broadband Service Provider	Service Provider (external)	Active
DSL Service Provider	Service Provider (external)	Active

Example of an organization structure in a Tree view

3.4.6 The Chart View

A chart view shows aggregated information in a picture. Charts are an easy way to get an overview. The 3D chart is ideal for inclusion in presentations. See Running Reports, to make a report in an image file format. The chart is then ready for use in a presentation. Use the 2D chart in information analysis tasks, see Drilling Down In A Chart.

There are various types of charts available.

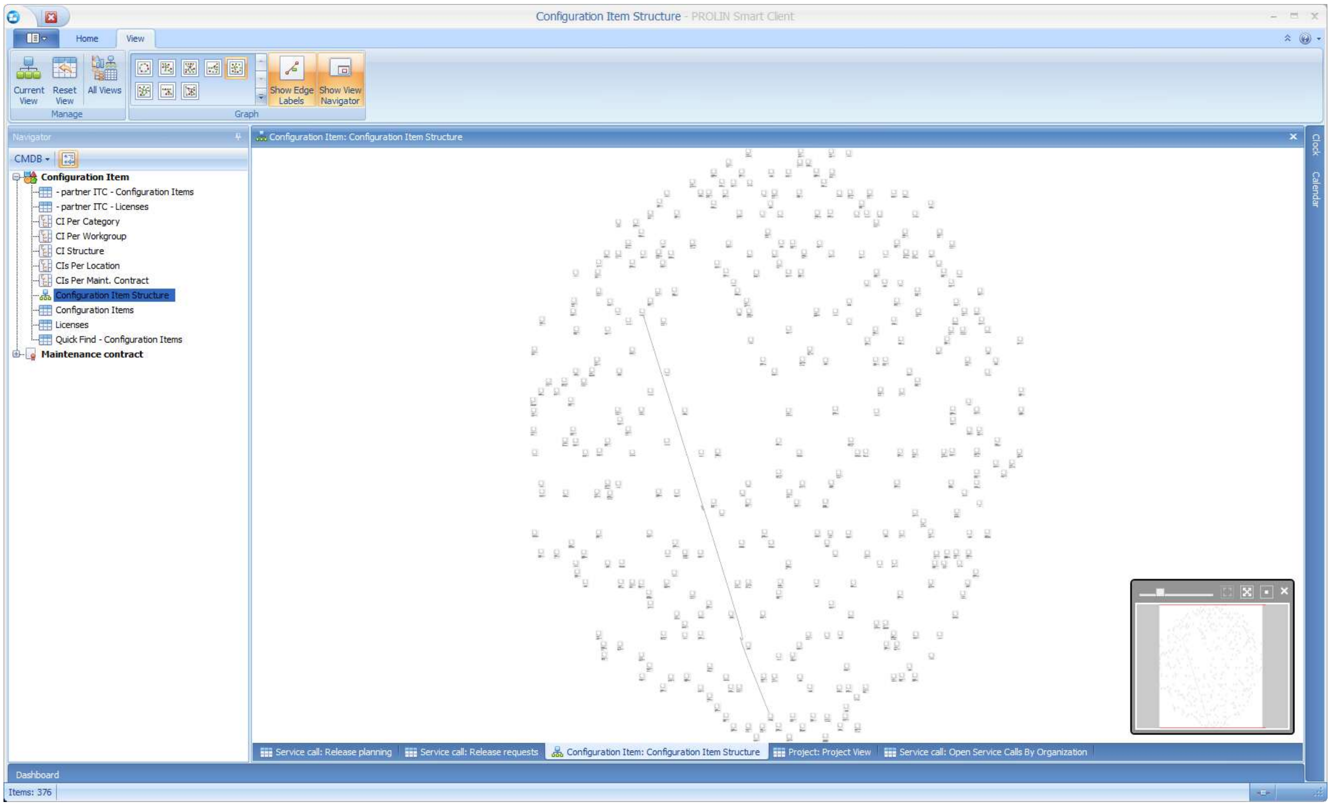


Example of A Chart View

3.4.7 The Network View

A network view is a graphical representation of connected configuration items. The network follows the parent-child relations of the Configuration Item. That means that the elements in the network view may or may not follow a physical network such as an IP network. The relations between Configuration Items may be created to find important relations, for example the relation between installed software and the operating system version it is installed on. Other relations may be created to quickly assess the impact of Changes. What the network view shows depends on the kind of relations your organization puts into the Parent-Child relations of the Configuration Items.

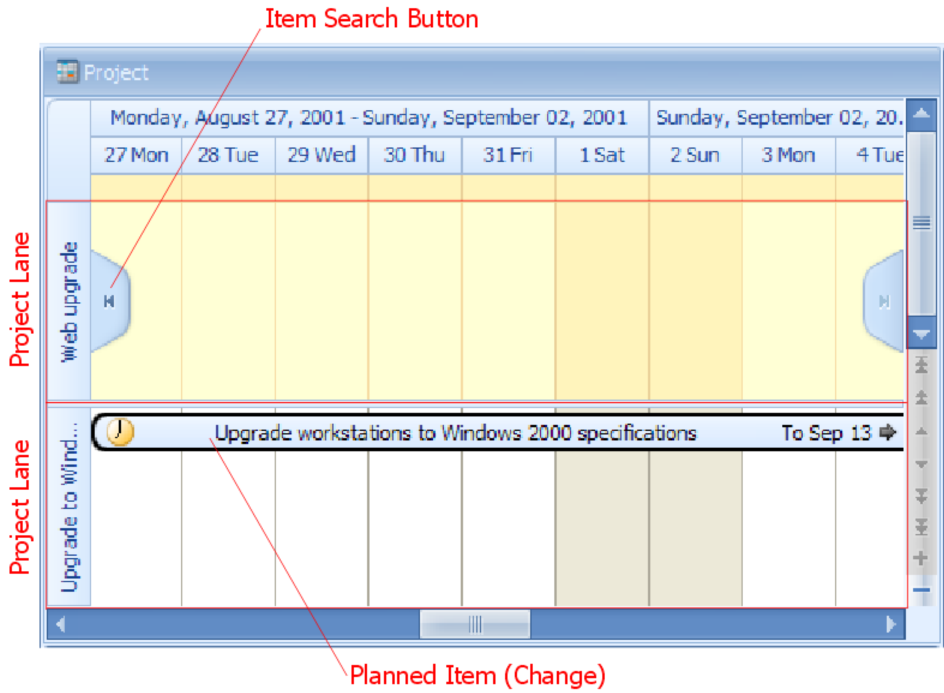
The items in a network view are connected with arrows. The arrow originates from the parent and points to the child in the Parent-Child relation.



3.4.8 The Scheduler View

A scheduler view shows Projects, Changes and Work Orders in a project format. You can find items in a Project or Change quickly by scrolling through the timeline or clicking the search buttons. The Scheduler view shows multiple projects in one view. Double clicking a planned item opens the item in a form.

The Scheduler view has the following parts.

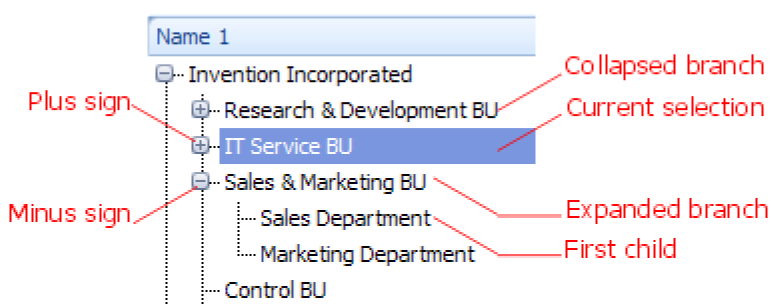


Parts of The Scheduler View

3.5 Navigating Trees

The Navigator, the Explorer views and Tree views contain trees. You can navigate all trees in PROLIN Smart Client the same way. Use one of three basic methods:

- Using The Mouse
- Using The Keyboard
- Typing Letters



Names used in trees

Using The Mouse

To expand or collapse branches select an item name and do one of the following.

- Click on the plus sign to expand the branch.
- Click on the minus sign to collapse the branch.

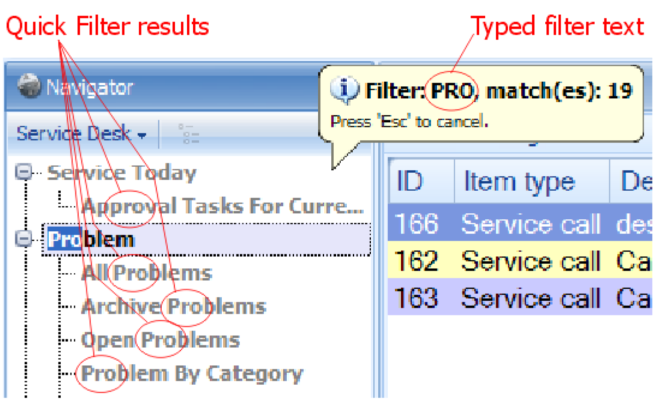
Using The Keyboard

- Press **Numeric Key +** to expand the current selection.
- Press **Numeric Key -** to collapse the current selection.
- Press **RIGHT ARROW** to expand the current selection if it is not expanded, otherwise select the first child.
- Press **LEFT ARROW** to collapse the current selection if it is not collapsed, otherwise select the parent.
- Press **DOWN ARROW** to select the next line in the tree.
- Press **UP ARROW** to select the previous line in the tree.

Typing Letters

If you know the name of an item you are looking for you can navigate a tree using the alphanumerical keys on your keyboard. Do the following:

1. Select an item in the tree.
2. Type the first letter of a name, the first item name in the tree with the typed first letter will be selected. If that view is in a collapsed item, the item will be expanded.
3. Type the second letter, the first item in the tree with a name beginning with the two typed letters will be selected.
4. Continue typing until you find the right item.



Quick Filter results as you type in the Navigator

You can continue typing with any speed, even wait. To begin a new sequence, press **Esc**, select a node with the mouse or select anything outside the tree view.

In the Navigator, the tree is filtered as you type. A balloon showing the filter and the number of matching views is shown. Matching views names will remain in the navigator. Only the navigator tree has a filter and shows the number of matching items in a balloon.

See also Using Shortcut Keys.

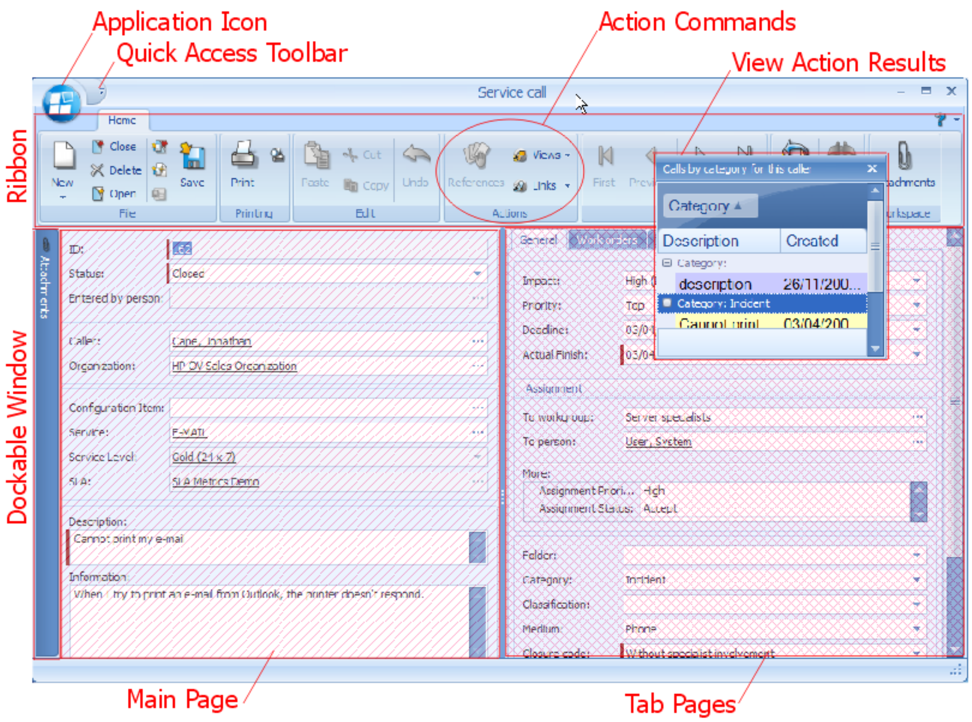
3.6 Parts of a Form

The forms have the same parts as the console. Although console and forms contain the same parts, console and forms serve different purposes. The console presents multiple items in a view, a form presents the details of an individual item in pages. You open the form from a view.

The central part of the form consists of the main page and the tab pages. Left, right and to the bottom of the pages, you will find action windows. The form has two special action windows.

- In the Attachment window you can manage attachments of an item.
- The results of the View Action commands are shown in action windows.

The following image shows the parts of a form.



The Parts of a Form

See also:

- Opening An Item In A Form
- Opening Views Related To A Form
- Managing Attachments In A Form

3.7 Shortcut keys

Next to the standard Windows shortcut keys PROLIN Smart Client has a few specific shortcut keys available as well.

The table below gives an overview of these keys. Whether or not a shortcut key works depends on where you are (i.e. Ctrl-S works in a Form but not in a View).

Console

F1	Help
F2	Advanced find
F5	Refresh

F11	Window full screen
Alt-F4	Application exit
Ctrl-F4	Close open item(s)
Ctrl-D	Delete selected item(s)
Ctrl-F	Quick search in view data
Ctrl-M	Open selected item(s)
Ctrl-N	New item
Ctrl-O	Open Item dialog
Ctrl-P	Print

Data Form + Email Data Form

F2	Advanced Find
F5	Refresh
F7	Spellcheck
Alt-S	Save and Close

Data Form

Ctrl-F4	Close
Ctrl-D	Delete
Ctrl-N	New
Ctrl-O	Open Item dialog
Ctrl-P	Print
Ctrl-S	Save

Email Data Form

Ctrl-R	Reply
Ctrl-S	Send
Ctrl-Shift-F	Forward
Ctrl-Shift-R	Reply all

Attachment Pane

`Del`	`Delete`
`Ctrl-Add(+)`	`Add attachment`

Collection Editor

`Del`	`Remove item/remove relation`

Advanced Find

`F2`	`Search/Find now`
`F11`	`Window full screen`
`Ctrl-D`	`Delete selected items`
`Ctrl-N`	`Create new filter`
`Ctrl-O`	`Open filter`
`Ctrl-P`	`Print`
`Ctrl-S`	`Save filter`

Expression List (filter advanced tab)

`Ctrl-Add(+)`	`Add expression`
`Ctrl-Subtract(-)`	`Remove expression`

Forms Designer

`F11`	`Window full screen`
`Del`	`Remove element`
`Ctrl-F4`	`Close form`
`Ctrl-E`	`Form properties`
`Ctrl-R`	`Rename element`
`Ctrl-S`	`Save form`
`Ctrl-Left`	`Move page left`
`Ctrl-Right`	`Move page right`
`Ctrl-Up`	`Move element up`
`Ctrl-Down`	`Move element down`
`Ctrl-Shift-D`	`Remove Page`

`Ctrl-Shift-P`	`Add page`
`Ctrl-Shift-R`	`Rename page`

4 Using Views

Let's get to work. In this chapter you will learn how to perform basic tasks with PROLIN Smart Client. Refer to Navigating The Smart Client to learn the parts of PROLIN Smart Client and what their names are.

4.1 Finding Information

PROLIN Smart Client makes finding information easier than ever. PROLIN Smart Client has smart functionality that help you find the detail quick and easy.

Basic to finding any information in PROLIN Smart Client is knowing that you work with the most sophisticated ITIL compliant Service Management software available. ITIL is all about good or best practices. Best practices result in activities and tasks, coming forth out of processes and procedures, that provide the best results. Eventually you perform the activities to achieve the objectives of the processes.

In PROLIN Smart Client processes and procedures are designed around items. For example, Problem Management is a process around Service Calls, Incidents, Problems, Changes, and Services. In Problem Management you will analyze all these items to identify possible Problems. Once identified and created in PROLIN Smart Client, you can resolve the Problem.

In the next sections three examples of finding information are discussed. The discussions are brief. In the discussions you will find links to pages where you can learn details of a certain task. In the first two examples Problems are used, however you can perform the shown tasks on other items too.

The following examples are discussed here:

- Finding Problems, an example of finding information by analyzing items
- Closing a Solved Problem, an example of finding detail information of an item
- Finding a Colleague, an example of finding any information using advanced find

Finding Problems

Amongst other responsibilities, Problem Managers are responsible for identifying Problems. For example, Problems can be identified by analyzing Incidents that come in over a given period, an hour, a day or a week. If in a given hour the number of Incidents reported from network configuration items increased dramatically, then there might be a problem. Often the network management system will automatically react to most events, but problems may arise.

You can take two steps to identify Problems:

1. Manipulate a table view. Table views show all records and are thus the ideal starting point for a search.
   - Find the view that contains the right information. See Finding And Opening A View.
   - Filter the information that you see in the view. See Filtering Items In A Table View
   - Show or hide columns to look at the information from various perspectives. See Manipulating Columns In A Table View.
   - Group items to focus on one group of items with shared field values. Within the group of items you can see what further they have in common or how they are different. See Grouping Records In A Table View.

2. Create a chart. Chart views show aggregated records and are thus ideal for showing trends in the records.
   - Standardize analysis with drilling from a chart to another view. See Drilling Down In A Chart.
   - Use charts to regularly create a report of a Problem. See Running Reports.

Closing A Solved Problem

Apart from identifying Problems, the Problem Managers are also responsible for the life cycle of the Problem. Problem Managers identify and record Problems, and they make sure that Incidents do not occur anymore. To change the details of an item, you may do the following:

1. Find And Open A View.
2. Open The Item In A Form.
3. With the form open, you may change the field values and save the result. To close a Problem, change the status code.

Finding A Colleague

While there are more specific organizational networking tools, PROLIN Smart Client contains all the information for your work related network. Whether it is to drink coffee or to discuss a Problem, all information about your colleagues is available.

To find a Person you can either use a table view of the Person item of the Organization item group or you can use Advanced Find. See Using Advanced Find to learn more.

4.2 Finding and Opening a View

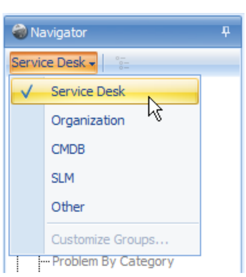
To find and open a view, you use the navigator. The navigator is a action window, usually located to the left hand side of the console. The navigator shows groups of items. For each item the available views are shown. The items are shown in a tree and the views are shown in the branches under each item.

You easily navigate through a large number of views with the navigator's quick filter.

Using The Mouse

To navigate to and open a view do the following:

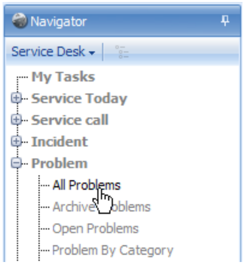
1. Open the navigator, the navigator is usually open on the left hand side of the console.
2. At the top of the navigator select an item group. You can choose from the item groups that you are authorized for.



Select Item group Service Desk

3. In the navigator tree, open an item branch. You can choose from the items you are authorized for.

4. In the item branch, select the view.



Select view All Problems

5. The view opens in the view window.

Alternatively, do the following:

1. Click **All Views** in the **Manage** group on the **View** tab.
2. In the **All Views** dialog, select the item type you want to see from the **Item** list on the right hand side.
3. In the **Views** list, select a view and click **Apply View**.
4. When you have found the right view, close the **All Views** dialog.

Using The Keyboard

You can quickly find and open a view if you know the name of the view.

The navigator contains a tree. The root of the navigator tree is a process and the smallest branches in the navigator are views. The navigator may contain a large number of views. To more easily find the view you need, the views are organized by item. Each item has views in branches. You can collapse and expand branches to temporarily hide views and get a good overview. If an item has views in its branches, then there is a plus or minus sign left to the item name. See [Navigating Trees](#).

4.3 Changing View Options

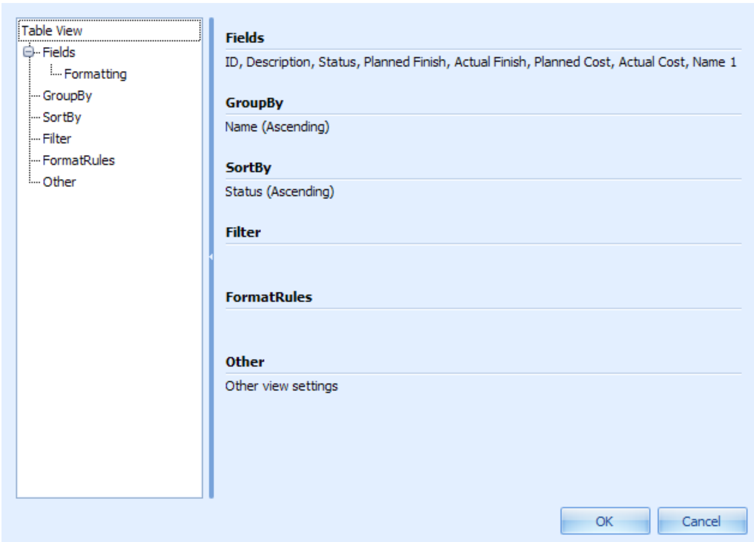
Most views you will work with will be the same views as your colleagues use. The same views are used for the same kinds of tasks. During your work you may find that changing a view slightly will give you a better look on the details or will result in a better report you need for a meeting. Instead of creating a new view, you decide to alter the view. Creating a new view is needed when a new task arises that is better supported with a new way of looking at the items.

To change the layout of the view, do the following:

1. Open the view you want to change.
2. Open the **View** tab. The groups and icons available in the **View** tab depend on the view type that is opened.
3. In the **View** tab click **Current View**.

Current View command for a table view

4. The **View Options** dialog is now shown.



View Options dialog for a Table view

5. Change the settings in the **View Options** dialog box.

You can change some of the more common options of the view by using the commands in the **View** tab of the ribbon.

Fields

Depending on the type of view, you can choose the fields the view shows. In a table view you can choose which fields are shown in the columns. In a chart view you can choose the fields which are used to create the chart.

To select the fields in a table view, open the **Fields** screen. In the **Fields** screen, one list shows the available fields and the other list shows the fields used in the table view. To show a field as column in the table view, select the field in the available fields list and click **Add** or double click the field name. To select a field from related items, choose the related item from the **Show available field for** list. To choose a display format for each field, first open the formatting screen then select the field and choose the formatting options.

To select the fields in a chart view, open the **Fields** screen. In the **Fields** screen select fields for the X-Axis, the Y-axis and for the series. Not all chart types show all these fields.

Filters

Part of the view definition of a table view and chart view is a filter definition. A view's filter determines which items are shown in the view. Using a filter you can create a view that only shows Service Calls that are assigned to you. See Editing Filters to learn more about advanced filters.

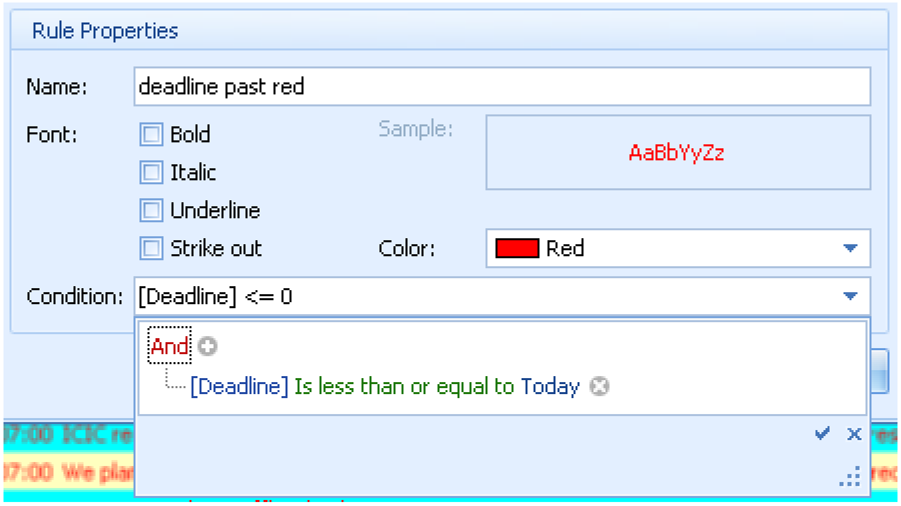
Format Rules

Format rules allow you to attract your attention to specific items in the list. In a view that shows all Service Calls, you could highlight Service Calls that are past their deadline with a red font.

To create a new format rule, do the following:

1. In the **View Options** dialog, open the **FormatRules** screen.
2. In the **Rules** screen, click **Add**. In the **Name** dialog change the name and click **OK**.

3. In the **Rules Properties**, select one or more character formatting settings. The **Sample** field will show what the result is of the selected settings.



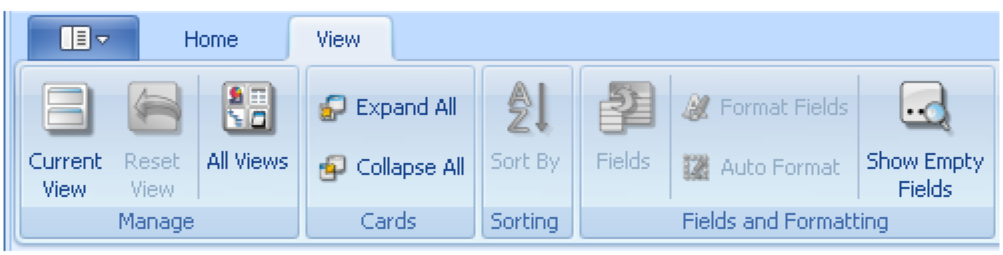
View format rule properties

4. Open the **Condition** list and create one or more conditions. The rule condition determines to which items the selected formatting will apply. The conditions are created like filters, for more information about how to create filters see [Editing Filters](). The **Condition** list can be resized if needed.

5. When you have completed the condition, click the check mark button to save the condition.

4.4 Creating Personal Views

The views that are available when you start PROLIN Smart Client are the views made available for the processes in your company. You may have the privilege to create your own personal views. Personal views are stored locally and you can change them to make uncommon tasks easier.

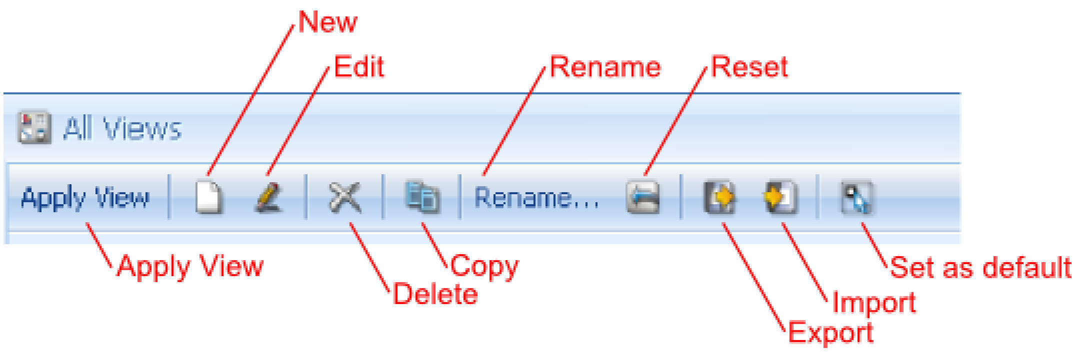


Example of View ribbon

To create a personal view, do the following:

1. Click **All Views** in the **Manage** group of the **View** tab.
2. In the **All Views** dialog, click **New**.
3. In the **New View** dialog, enter a name for the view and choose the type of view you want to create.
4. In the **View Options** dialog, set the view. See [Changing View Options]().

5. When ready, click **OK**.



Personal view toolbar

NOTE: The newly created and save personal view will be available in the Navigator with all selected fields when you restart PROLIN Smart Client.

In the All Views dialog you can also do the following:

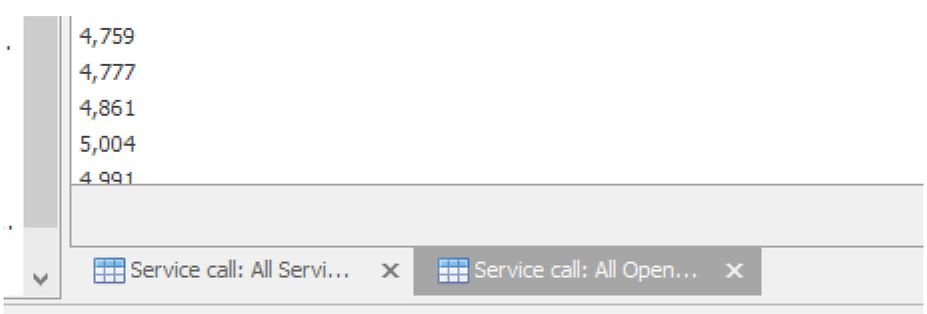
- Click **Edit** to open the **View Options** dialog. See Changing View Options.
- Click **Delete** to delete the currently selected view. You can only delete personal views.
- Click **Copy** to copy the currently selected view. A dialog will appear in which you can enter a name for the copy.
- Click **Rename** to rename the currently selected view.
- Click **Reset** to return a system view to the original settings, as received from the server. You cannot reset changes to a personal view.
- Click **Export** the save the view configuration of the currently selected view to a file. You can distribute the file to other users.
- Click **Import** to open a view configuration file.

4.5 Opening and Switching Multiple Views

To open multiple views, hold the **Ctrl** key while opening the view.

- Hold the **Ctrl** key while clicking on the view's name.
- Hold the **Ctrl** key while pressing **Enter** when selecting the view by name.

When you open views while holding the **Ctrl** key, each consecutive window is opened in its own tab page. If only one view is open, there are no tabs visible.



To switch views, click on the tab of a view.

To close views, click the close button (cross) button shown on each tab. Note that the tabs will not be visible for the last open view.

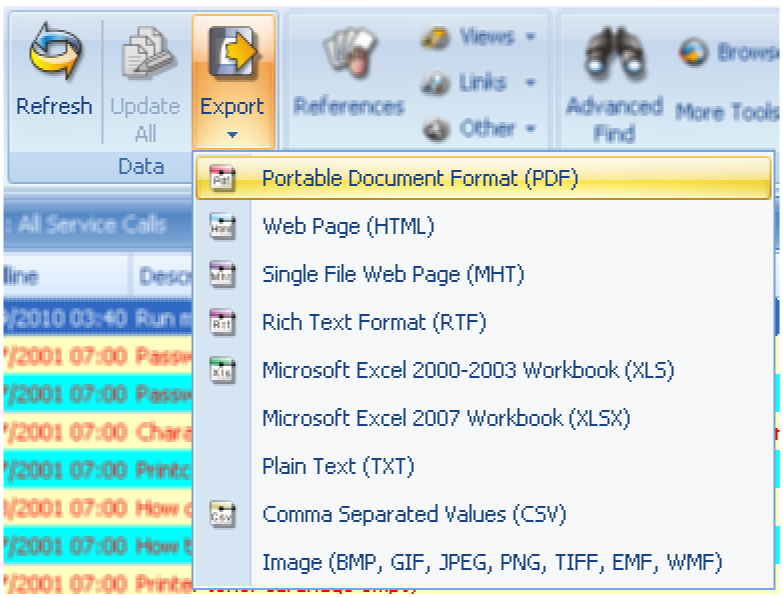
4.6 Exporting View Data

Views give you a good overview for use in reports or presentations. You can export table views and chart views to file. The exported file you can use in reports and presentations.

PROLIN Smart Client has many formats available for export. You can export to PDF which is a good format for a document you want to distribute electronically. Picture files such as JPG or PNG files are good formats to use in reports or presentations.

To export a view, do the following:

1. Open the table view or chart view.
2. Click **Export** in the **Home** tab of the ribbon:



Choose the format from the menu

3. Choose the format you want from the **Export** menu.
4. Depending on the file type, a dialog will appear in which you can determine specific settings for the export format.
5. Find a location and enter a name for the document in the **Save As** dialog, and click **Save**.

Some file formats, will use a picture of the view. For example, a PDF will use a picture of a chart. The view's picture may not fit the page in the exported document. If you change the size of the view by changing the layout of the console, you may find a better fit of the view in the exported document.

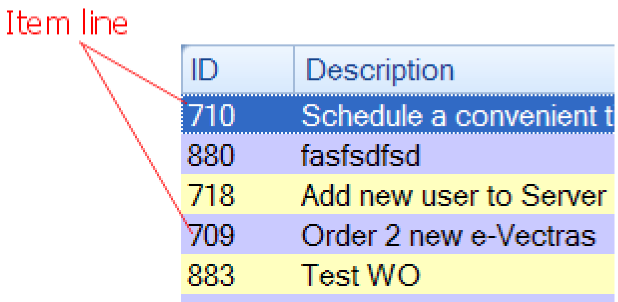
4.7 Table Views

Table views represent your data in a tabular format and provide a number of features for formatting, grouping, sorting and filtering.

4.7.1 Finding Items

The list of items in a table view may be long. Do not forget the scroll bar to scroll through the information.

To open an item in a form, double click on the item line in the view.



Item line, ready to open the form

For working with a table view see

- Manipulating Columns In A Table View
- Grouping Records In A Table View
- Filtering Items In A Table View

4.7.2 Filtering Items

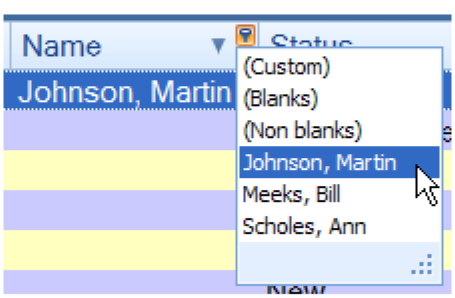
Filtering items in a table view is a quick way to zoom in on similar items. A filter can be set in the definition of the view. In addition to the definition of the view you can create filters on the view yourself.

Creating filters on date fields works slightly different than creating filters on other fields, see Creating Date Field Filters in this section.

Creating a filter on a column

To create a filter on a column do the following:

1. Move the mouse over the column header that you want to filter. Move until the filter button appears, the filter button is normally hidden at the upper right corner of the column header. The filter icon resembles a funnel.
2. Click the filter button.
3. From the filter menu, choose a filter setting.

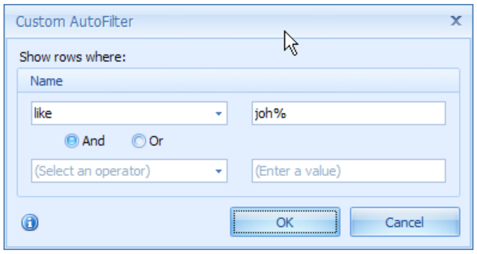


Column Filter drop down menu

4. The filter button is now shown in the column header and a filter setting box is shown below the table view.

Creating a Custom Filter

To start a custom filter, open the filter menu and click **Custom**. Now the Custom AutoFilter dialog is shown. In the Custom AutoFilter dialog you can create a flexible filter based on the column you selected to create the custom filter.



Custom Filter dialog

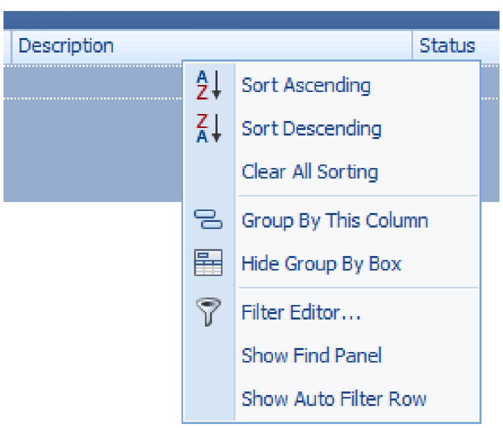
You can adjust the filter as follows.

1. Choose a filter that comes close to your needs.
2. In the filter settings box at the bottom of the table view, click **Edit Filter**.
3. The **Filter Editor** window appears. See Editing Filters

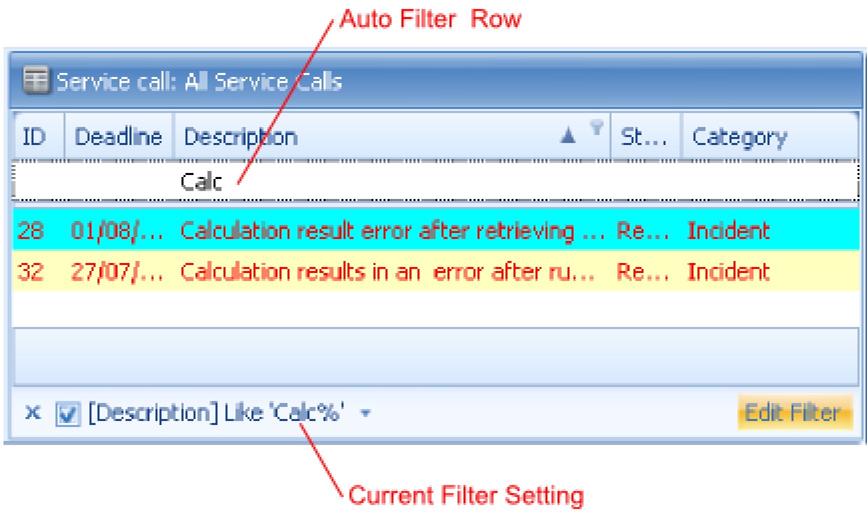
Creating Auto Filters

Auto filters allow you to quickly create and change filters. You create the auto filter in the view and the results are shown immediately. However, Custom Filter give greater flexibility. To create an Auto Filter, do the following:

1. In the view, right click on any column header. From the context menu, choose **Show Auto Filter Row**.



2. The view now shows the Auto Filter row below the header row of the view and the current edit settings below the view.



View with Auto Filter row

3. Start typing text or numbers in the column that you want to filter. You can type text in multiple columns. The column will be filtered using the *Like* predicate. The view will show items that have the typed text somewhere in the given column.
4. To close the Auto Filter row, right click in the header row and choose **Hide Auto Filter Row** from the context menu.

Creating Date Field Filters

To create a filter on a date field column do the following:

1. Open the filter menu of the date field column.
2. Select **Show All**, **Specific Date** or **Prior to this year**
   - Show All removes any existing filter.
   - Prior to this year shows all items that have a date that is before January 1st of the current year.
   - Specific Date allows to choose a date or a range of dates. See Date Selections below.
3. Click the close window (cross) button at the bottom left hand corner of the filter menu.

Date Selections

In the date field filter menu do one of the following.

- Click on one date to select that date.
- Zoom out: click on the month, year line to zoom out to months of a year, the years in a decennium and the decennia in a century.
- Zoom in: click on a decennium, a year and a month to zoom to a specific date.

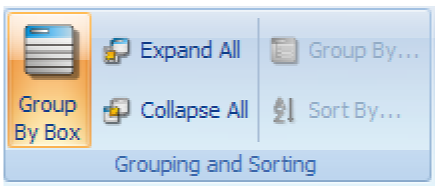
4.7.3 Grouping Items

Grouping items is a great way to quickly gain overview. Sorting a column does group items with the same value together. However, you can only sort one column at a time. Grouping brings items together and then you can still sort the items on one of the other fields. You will quickly see resemblance and differences among the items in your view.

Because you can collapse the groups, grouping helps navigating a table view. Collapse the groups and find the group you are looking for, then expand that group to see the items available in that group.

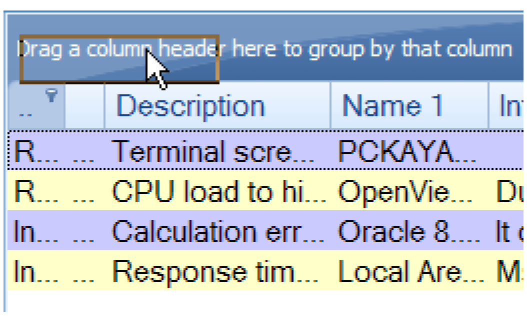
To group items do the following:

1. Open the table view.
2. In the **View** tab, click the **Group By** command in the **Grouping and Sorting** group.
3. The **Group By** command is now highlighted and above the table view the **Group By Box** is opened.



Group By command highlighted

4. Drag the column header you want to use for grouping to the Group By Box and drop the column header.



Dragging the first column to the Group By box

Note that columns used for grouping can be filtered too. See Filtering Items In A Table View

Free Text Fields

Free text fields, such as descriptions, are not a good choice for grouping. Almost every free text field is different and thus when you group by a free text field each group will contain only one item.

Date Fields

Grouping on date fields will group items for each day on the calendar. To change the interval of the grouping, right click on the column header in the **Group By** box, point at **Group Interval** and choose the interval.

Grouped by Status and Planned Fnish date

terval	***esult***
None	Items are grouped by difference of the date, result is equal to the Day interval.
Day	Items are grouped for each day of the calendar.
Month	Items are grouped for each month of the calendar.
Year	Items are grouped for each year of the calendar.
Smart	The grouping will be automatically chosen for optimal clarity. Groups will be shown as applicable. • For dates in the past, items will be grouped in the groups Yesterday, Last Week, Two Weeks Ago, Three Weeks Ago, Last Month. • The Older group is for items with a date older than last Month. • For dates in the future items will be group in groups Today, Tomorrow, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Next Week, Two Weeks Away, Three Weeks Away, Next Month. • The Beyond Next Month group is for items with a date farther away than next month.

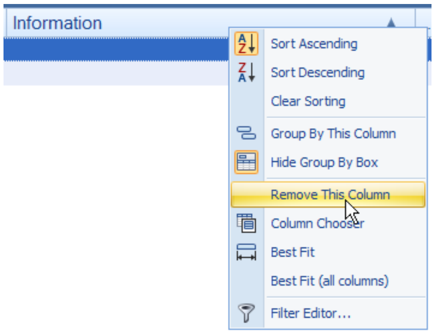
4.7.4 Manipulating Columns

Table views are used to give an overview of a list of items and they are used to open items in a form. To see a field better on print, you may want to make more space for that field by removing another field. For example, to show the complete description you remove the status code. In other situations, you may want to increase the width of the status code and reduce the width of the description field. Either way, you increase the space available for one of the columns in the table view.

To increase the space available for a field shown in a table view, you can either remove columns temporarily or change the width of the columns.

Temporarily Removing Columns

To temporarily remove a column in a table view, right click on the header of the column you want to remove. Choose **Remove This Column** from the context menu.

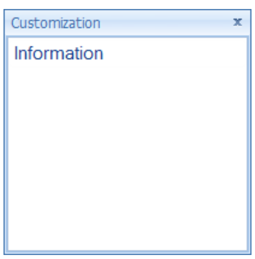


Remove the Information column

The column you remove this way will not be removed from the definition of the table view. To see which columns of the table view definition are not currently shown, right click on a column header. Choose **Column Chooser** from the context menu. The column chooser is not a action window.

To place the column you removed back into the table view, do the following:

1. Right click on a column header.
2. Choose **Column Chooser** from the context menu.



Information column in the Column Chooser

3. Drag the column you want to place back from the **Column Chooser** window into the table view.
4. The column is back in the table view.

The removed column will stay in the **Column Chooser** until you replace the column or change the view options.

Changing The Width Of A Column

To change the width of a column, do the following:

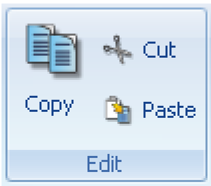
1. Move your mouse over the side of the column header until a double arrow appears.
2. When the double headed arrow appears, click and drag the column border.
3. Release the mouse button when the column has the right size.

The changes of the width are not stored. The next time you open the view, the width of the columns will be automatically adjusted.

4.7.5 Copying Information

To copy information from an item in a table view, do the following:

1. In the table view, select one or more items.
2. From the **Edit** group in the **Home** tab, click copy. Alternatively press ***CTRL+C*** on the keyboard.



The Edit Group

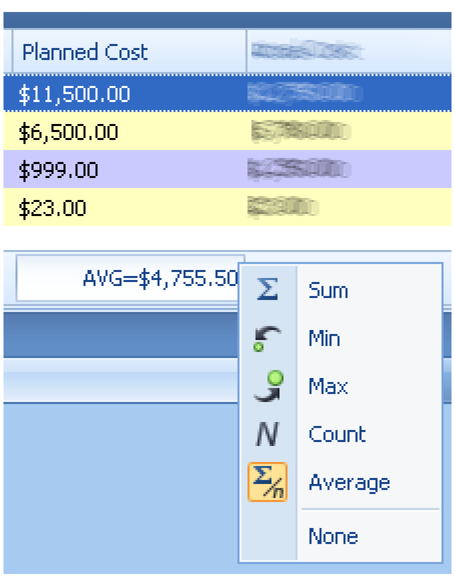
3. You have now copied the information from the items to the clipboard. You have copied the information from the visible columns of the selected items. This includes information from very narrow columns that are hardly visible on the screen.
4. Switch to an application or a field where you want to paste the information. Place the cursor and press ***CTRL+V*** on the keyboard, or use the paste facilities of the application.

NOTE: Using **Paste** in a view will open the form of a new item in which you can paste the copied information.

4.7.6 Calculating

Imagine a customer wants to know the average Planned Cost of planned Changes. You can export a filtered table view of the requested Changes to a spreadsheet, see printing and exporting Views.

To give the quick answer however, right click in the bar at the bottom of a column in the table view. From the table view function menu, choose a function. The result of the function will be displayed in the bar at the bottom of the column. The type of value in the table column determines what functions are available in the table view function menu.



Choose from the table view function menu

4.8 Explorer Views

Explorer views provide quick paths to items. For a Service Desk agent an explorer view may give quick access to Service Calls created for people from a particular organization.

4.8.1 Finding Items in an Explorer View

In an explorer view you will find three parts. The navigation view, the base view and the detail views. What you select in the navigation view filters the items in the base view. The information in the detail views are items related to the item selected in the base view.

In the navigation view items may be shown as a tree or as a table. The trees are created from fields that refer to an item with a hierarchy, for example Organization fields, or from codes that have hierarchy, for example Category codes. The tables allow to show details of the item you use for navigating.

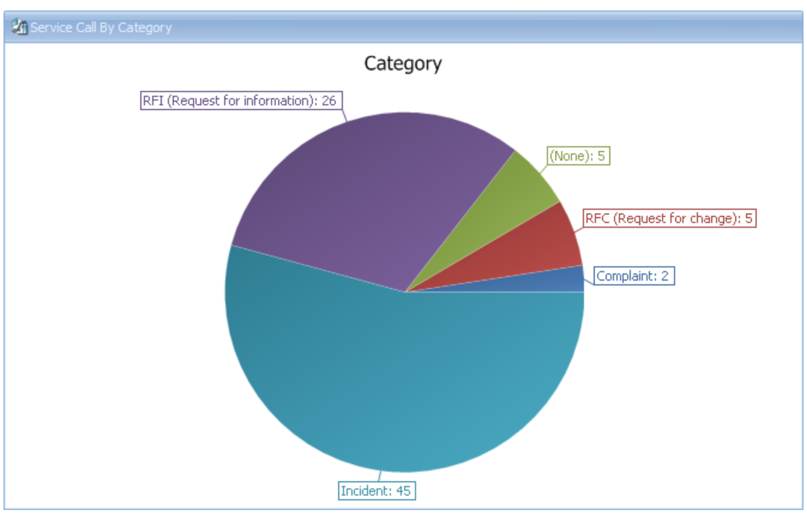
To be effective, explorer views take some time to plan and create. The item you are looking for may be in the detail view. But, the explorer view is grouped with the views of the item in the base view. For example, to find the Service Calls of a colleague of the caller you may use an explorer view that navigates on the organization, has Persons in the base views and Service Calls registered for this Person in the detail views. Although you are looking for Service Calls, you would find this explorer view in the Persons item branch in the Organization item group of the navigator because the base view shows Person items.

The navigation view may be a table view or a tree view. To use the navigation view, do one of the following:

- See Navigating Trees to learn how to use trees.
- See Finding Items In A Table View to learn how to use a table view.

4.9 Chart Views

A chart view allows you to create an aggregated representation of your data.



The Pie chart Service Call by Category in 2D mode

4.9.1 Drilling Down in a Chart

Drilling down a chart only works in 2D mode of the chart. To switch from 3D to 2D, click the **3D/2D** command in the **View** tab of the chart.

Chart in 3D mode

Some charts have a **Drilldown View** defined in the chart definition. The drilldown view allows to move from a chart to another view by double clicking a series or value element in a chart. The new view then shows details of the previous view in a table or another chart view. For example, in the pie chart Service Calls by Category when you double click the RFI category you may get a table view with all Service Calls of the RFI category. The All Service Calls table view will be filtered with the same filter as the pie chart with an additional filter on the Category you double clicked. If you link several charts this way, you experience drilling for information. Creating a useful drilling experience requires planning and design. The links selected between the chart and the view should be created to support a specific analysis task. Also, longer drilling chains do not necessarily provide more useful information.

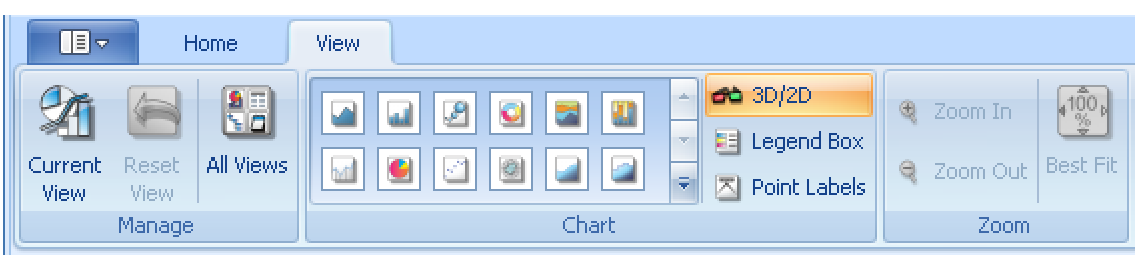
To add a drill-down view to a chart do the following:

1. Click the **Current View** command in the **View** tab.
2. In the **View Options** dialog, open the **General** page.
3. In the **Drilldown View** field select an appropriate view.
4. Clear the **3D** checkbox.
5. Click **OK**.

To drill in a chart, double click on the display element of the chart. For example, double click a bar in a bar chart or a section in the pie chart. Moving the mouse over the display element of the chart will highlight that display element.

4.9.2 Changing a Chart

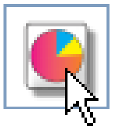
In PROLIN Smart Client most commands to change the appearance of a chart can be found in the **View** tab of the chart. The appearance options allow you to quickly find a professional look for your chart and to print the chart. You will be able to select an appropriate type of chart to represent the information.



View ribbon for a Chart view

To change the general definition of the chart see Changing View Options. Part of the definition of a chart view is the combination of values you choose for the X and Y axis and for creating series. How these values are displayed depends on the type of chart you choose.

To change the type of chart, choose the type of chart in the **Chart** group of the **View** tab.



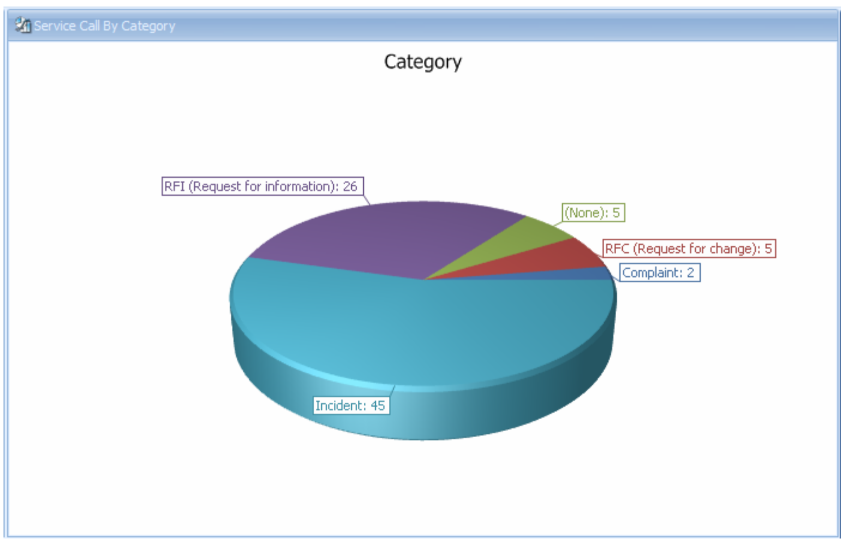
Choosing a pie chart

When the chart is displayed in 3D, you can change the display angle of the chart. When you move the mouse over the 3D chart, the cursor will turn into a flat hand. Click on the chart and drag the chart around, the cursor will turn into a grabbing hand. In 3D mode, the **3D/2D** button is highlighted.

Highlighted 3D/2D button

If the chart is displayed in 2D you may be able to drill down to the information contained in the chart. When the chart is 2D mode, the **3D/2D** button is not highlighted.

See also [Drilling Down In A Chart](#).



The Pie chart Service Call by Category in 3D mode

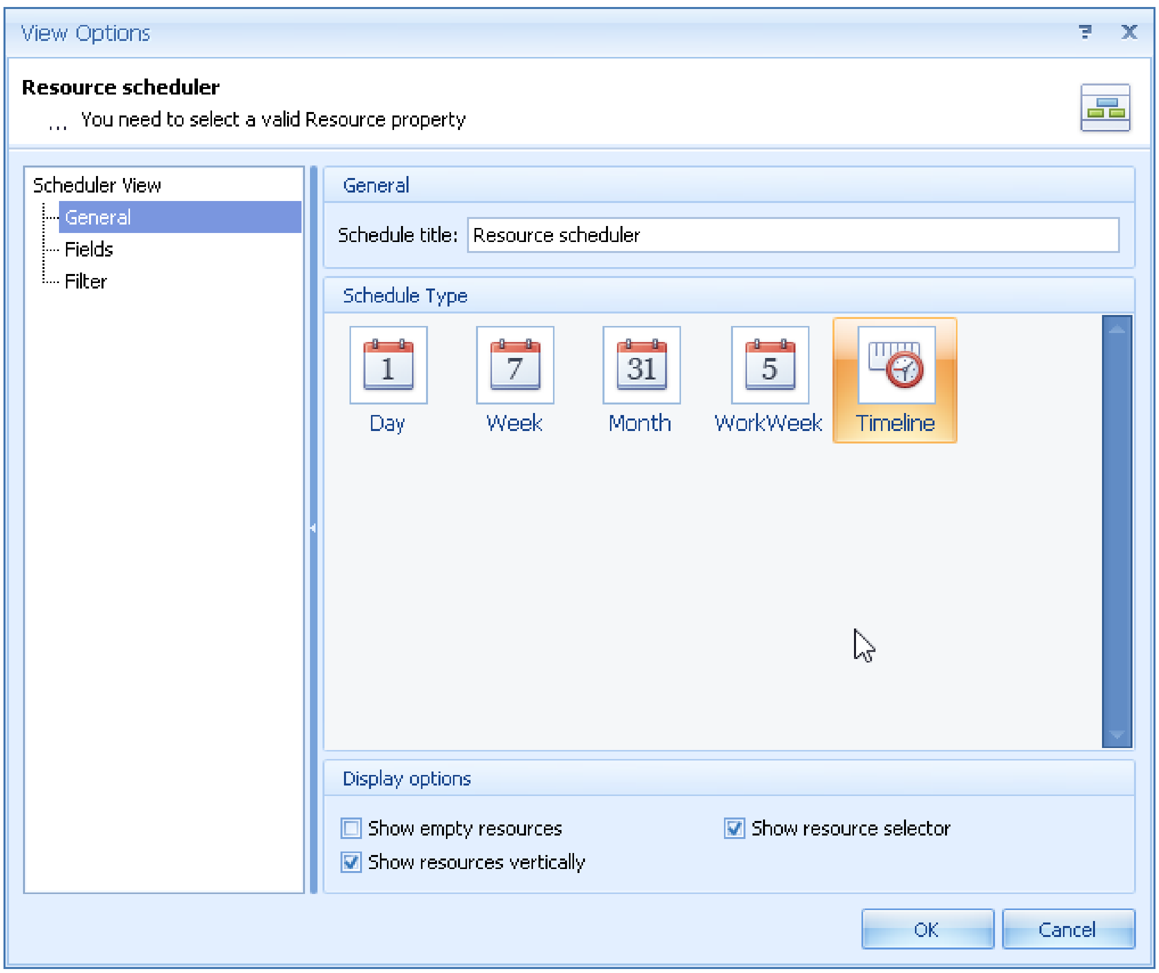
4.10 Scheduler Views

The scheduler view is a powerful view in PROLIN Smart Client which is available for all entities.

A scheduler view can be made by choosing New in the All Views dialog. Added to the standard view types you can now also select type "Scheduler". If you've chosen that type there are three dialogs where you can modify the view to your specific needs:

1. General
2. Fields
3. Filter

General

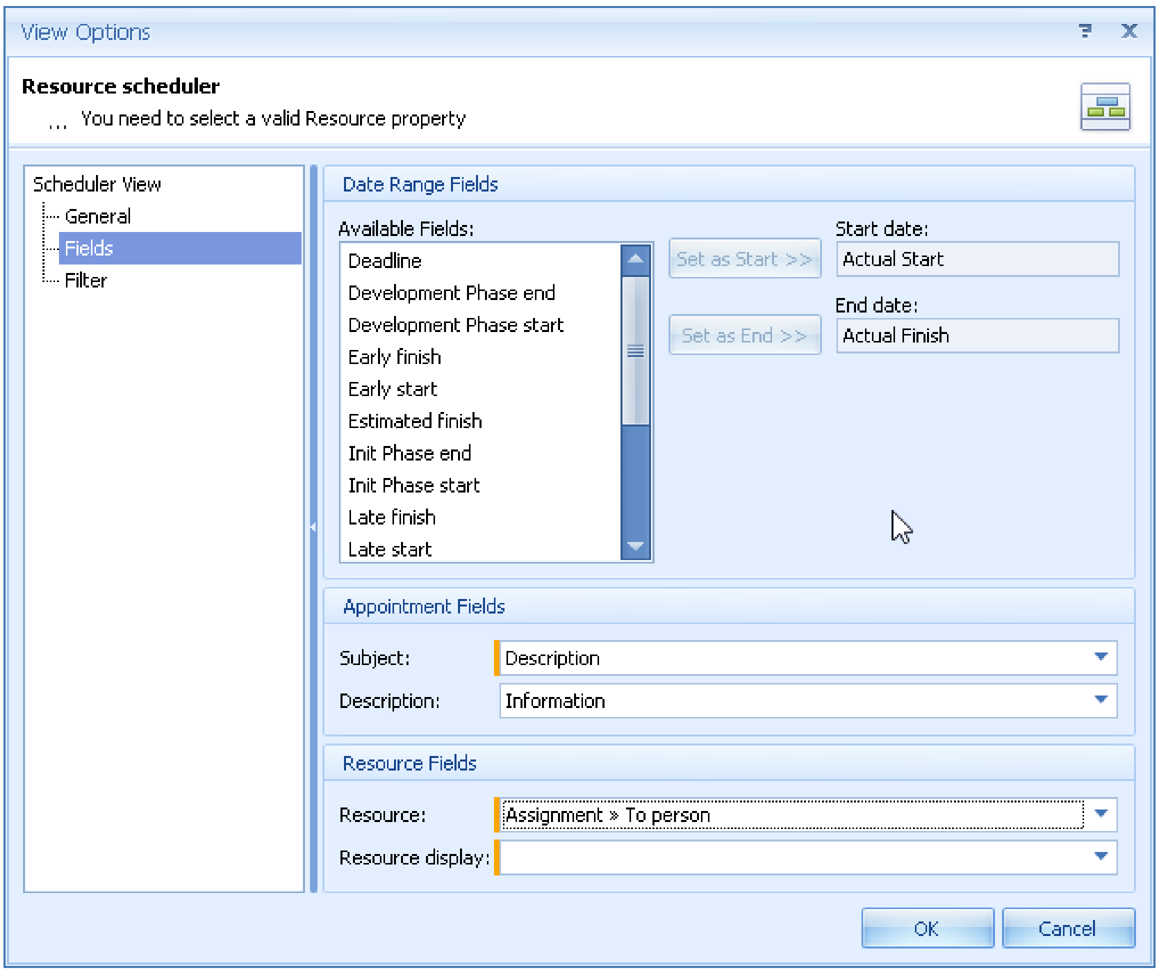


In this dialog you can specify the following:

Schedule Title	Define the title of the view.
Schedule Type	Define the default display mode of the view. This can be changed when the view is shown.

Show empty resources	All records that don't have a value in the field defined as resource property are grouped together under an empty resource. If this option is not selected, records with no value in the resource property field are not shown.
ow resource selector	When checked the resource selector is shown
ow resources vertically	If checked the value of the resource display property is shown vertically. Otherwise it is shown horizontally.

Fields



In this dialog you can specify the following:

ırt date	The start date and time of the activity.
d date	The end date and time of the activity.
ıbject property	The value which is shown in the view for the activity.
ıscription property	The value which is shown as more information in the tool tip when hovering over the activity.

source property	The value for which activities are shown. Activities are grouped by the Resource property.
source display property	The value which is shown for the resource in the view.

Filter

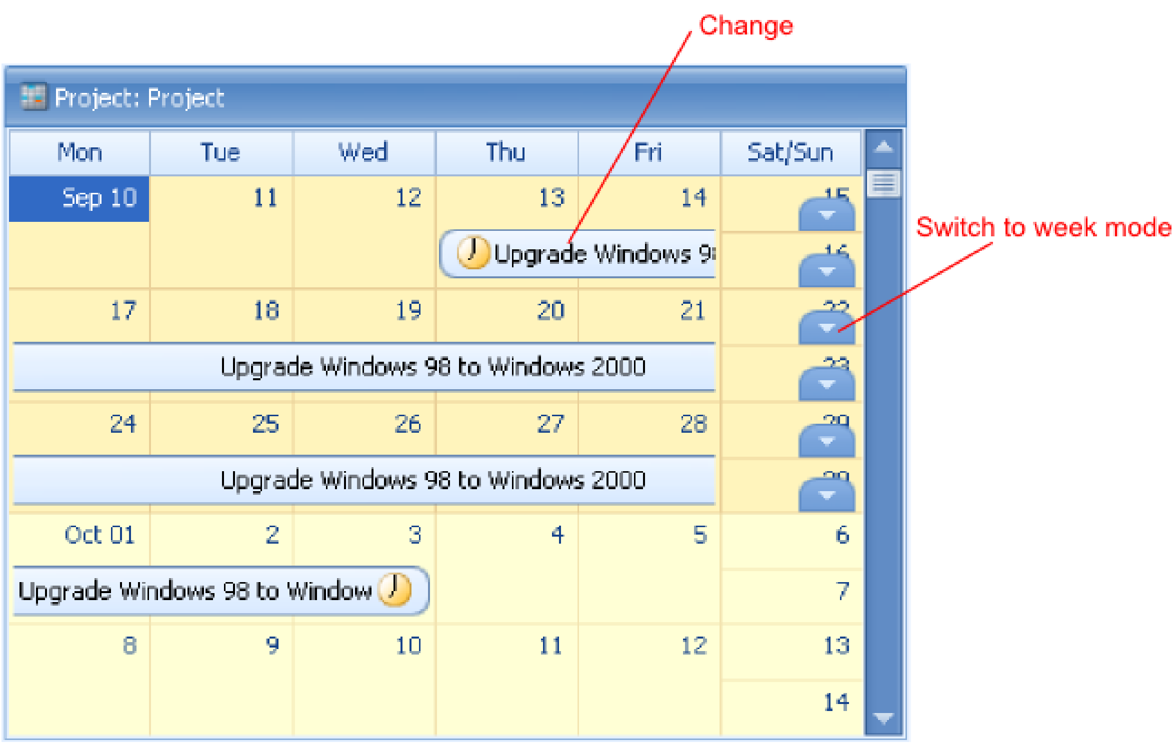
This is the standard filter dialog where selection criteria can be defined for this view.

Example

In the screens in the example below a schedule view is used that shows how Changes within a Project relate to each other visually. The schedules can be shown in various calendar forms and in a timeline. You can easily switch between the display modes.

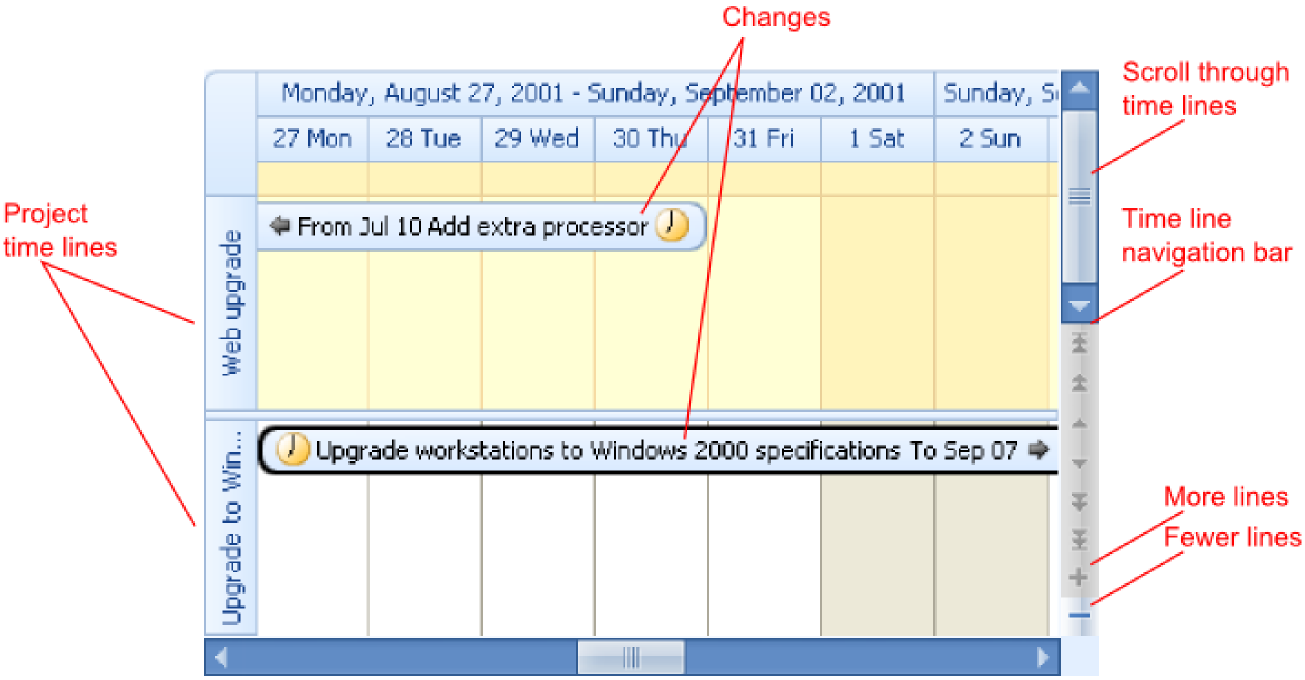
Scheduler view display modes

In the four calendar modes, the Changes are shown on a calendar. In these modes all Changes of selected projects are shown as they relate to each other on the calendar.



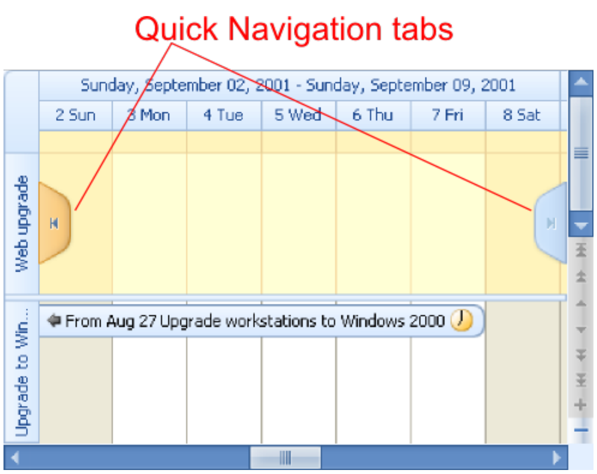
Scheduler View shows changes on a month calendar

In this time line, the scheduler view for Projects shows Changes related to a Project within a lane for that Project.



Scheduler shows projects in time lines

The time line view opens in the week that contains the current day. If a project lane shows no items, a quick navigation tab appears in the time line. The quick navigation tab can navigate back in time or forward in time. Click the quick navigation tab to jump to the start of the first next item in that direction.

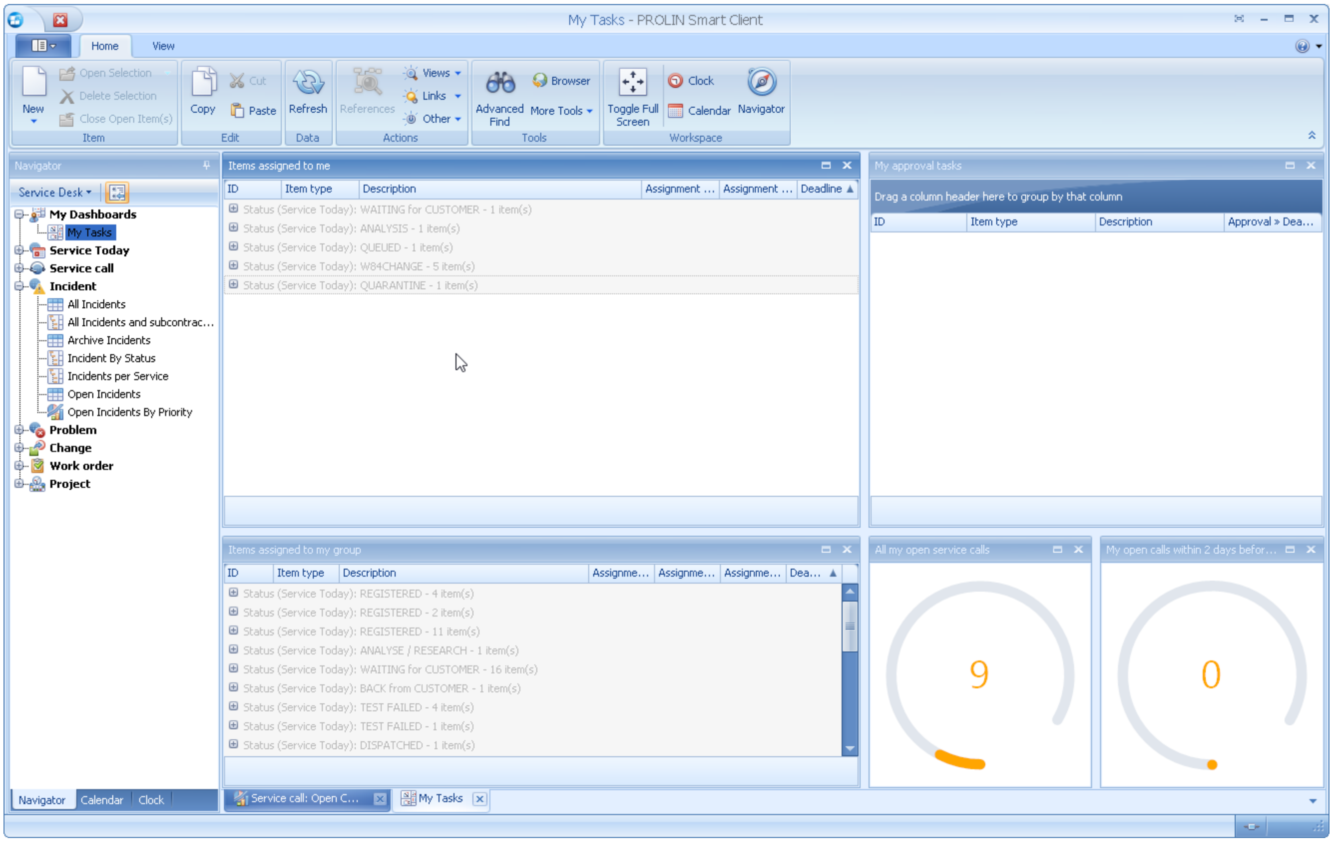


Quick Nagivation tabs in the time lines

4.11 Dashboard Views

Using dashboard views in PROLIN Smart Client end users can create composite views containing other view types like tables, charts, cards, trees, and the new gauge views. The only restriction is that you cannot use other types of composite views (like other dashboard views or explorer views). Note that a dashboard view is not bound to a particular entity and can embed views that are entity-bound.

By default PROLIN Smart Client is shipped with the **My Tasks** dashboard view as shown below. In previous releases this view was already provided but end users were not allowed to change its layout or content. Note that it now also shows two gauge views at the bottom right. Also note that it appears below the **My Dashboards** node in the navigator on the left hand side. If you create other dashboard views then they will also be shown there.

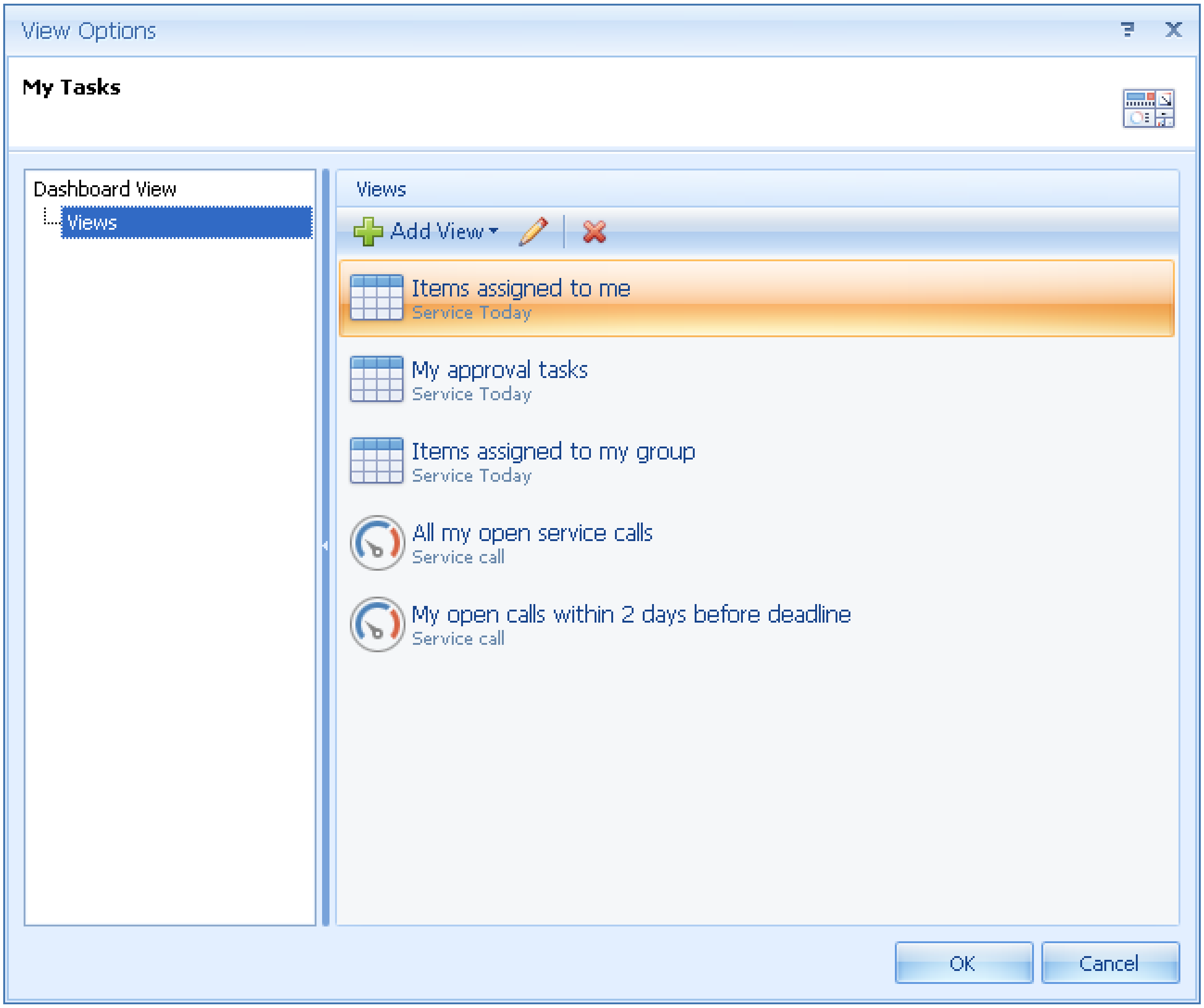


Dashboard showing 5 child views

You can rearrange the layout of a dashboard by dragging and holding the header of a child view and dropping it at your location of choice. Similarly you can increase or decrease the size of a view by using the drag bars between the individual views.

To close a child view simply click the close button (cross) in the top right corner of its header. Note that no confirmation will be asked, so if you close a child view by mistake you can re-add it by using the **Views** section in configuration dialog of the dashboard view as described in the next topic.

Configuration



The dashboard view configuration dialog

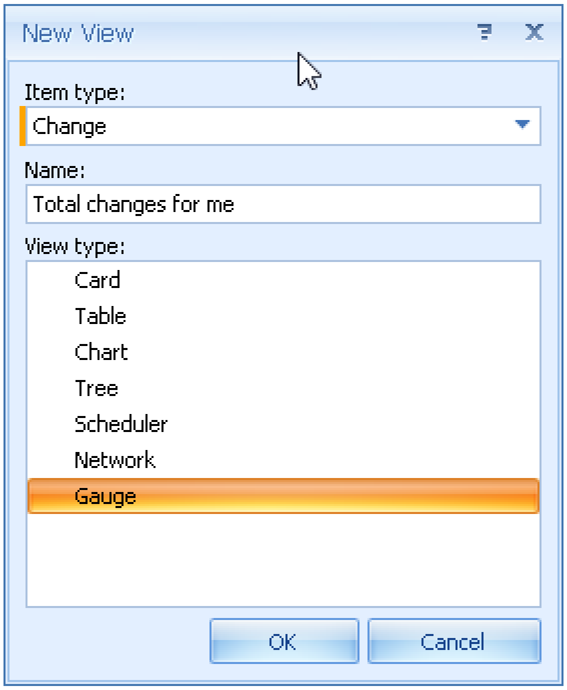
In the shown dialog you can perform the following tasks:

- Add a new or existing view to your dashboard view
- Remove a view from your dashboard view
- Edit the configuration of a referenced view.

Adding Views to a Dashboard View

To add a new view, do the following:

1. Click the **Add View** menu item.
2. Click the **New View...** menu item.

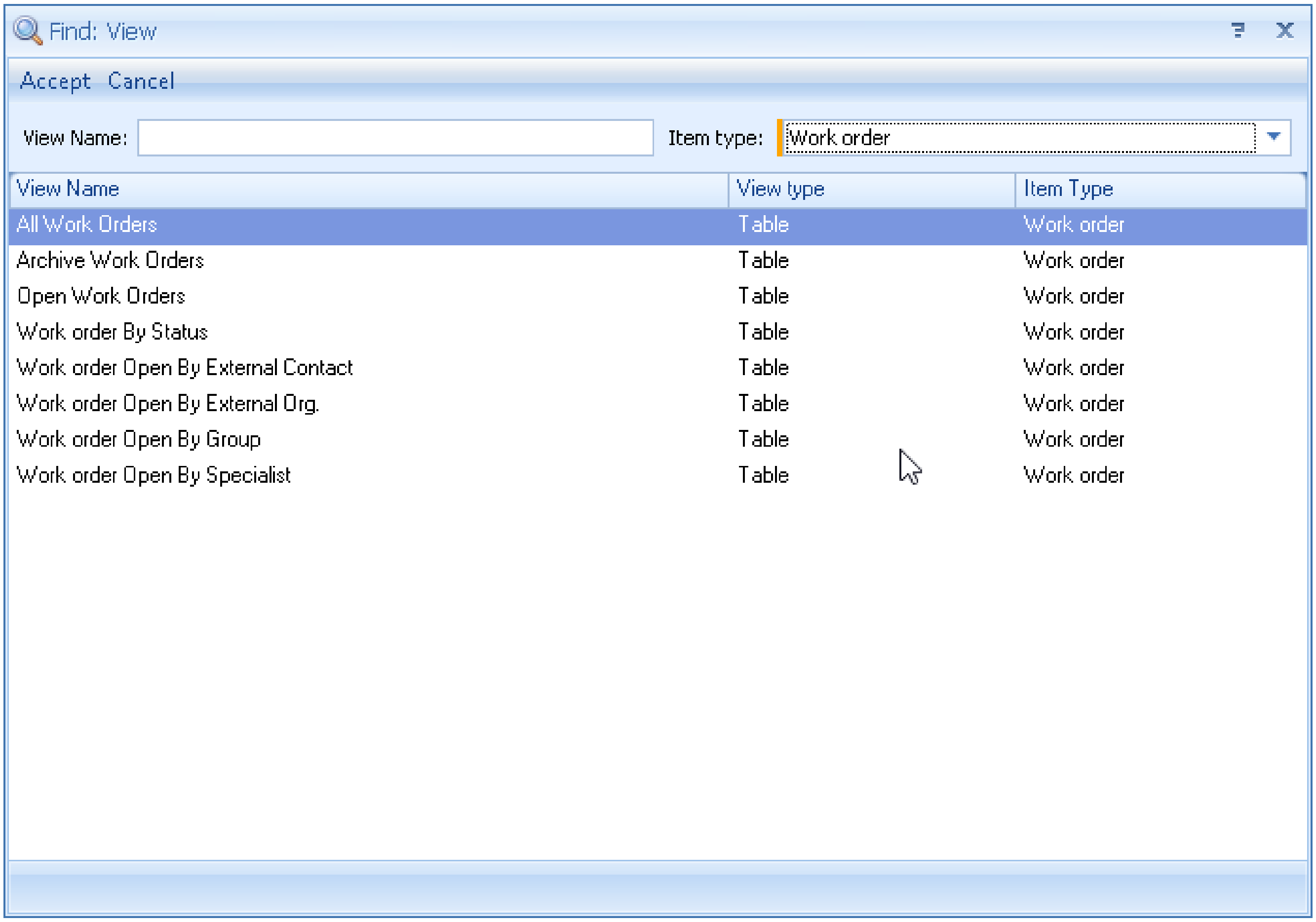


The New View dialog

3. In the **New View** dialog fill in an **Item type**, **Name** and **View type**
4. After pressing the **OK** button another configuration dialog will be shown for your new view.
5. Once you have configured your new view and pressed the **OK** button, it will be shown in the list of views in the configuration dialog of the dashboard view.

To add an existing view, do the following:

1. Click the **Add View** menu item.
2. Click the **Find...** menu item to open the Find View dialog and search for an existing view:



The Find View dialog

3. After clicking the **Accept** button, the selected view will be shown in the list of views in the configuration dialog of the dashboard view.

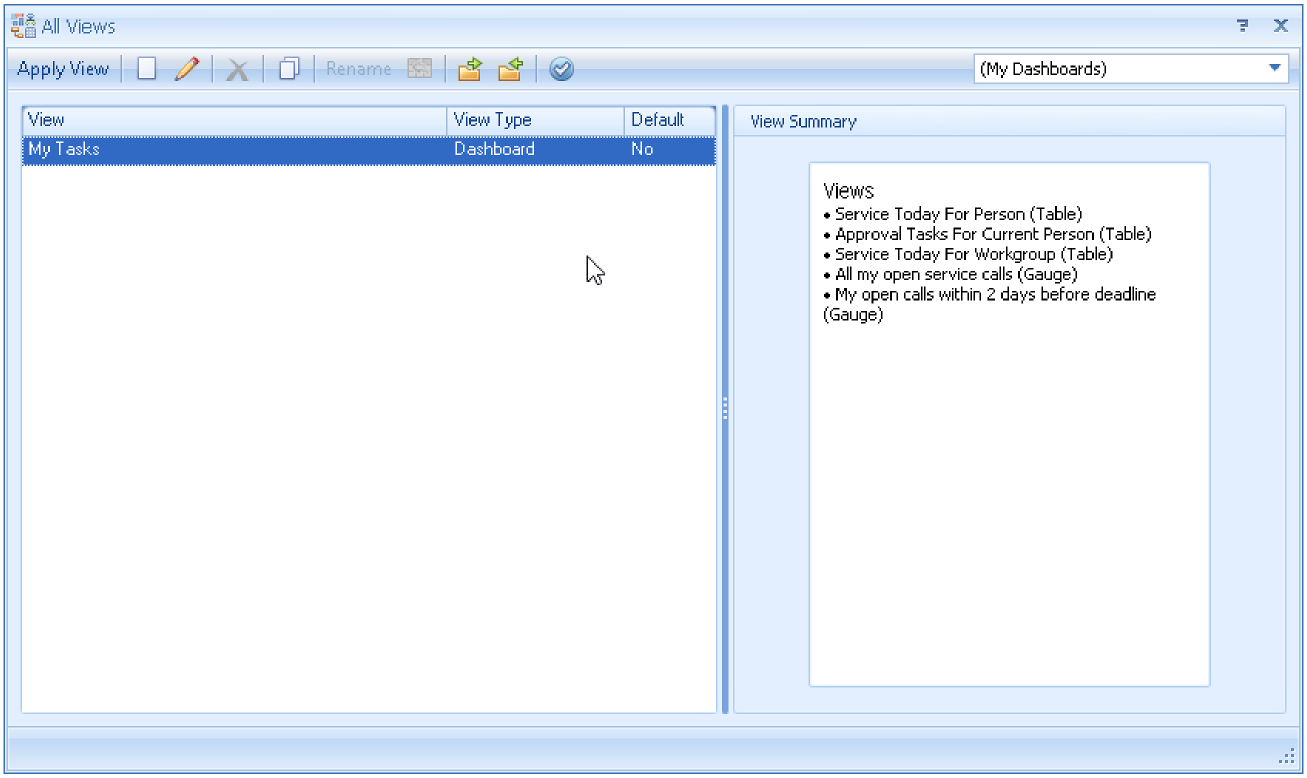
4.11.1 Add or Remove Dashboard Views

Add Dashboard Views

While the default **My Tasks** dashboard view can be fully re-configured to your needs, it is also possible to add your own custom dashboard views by doing the following:

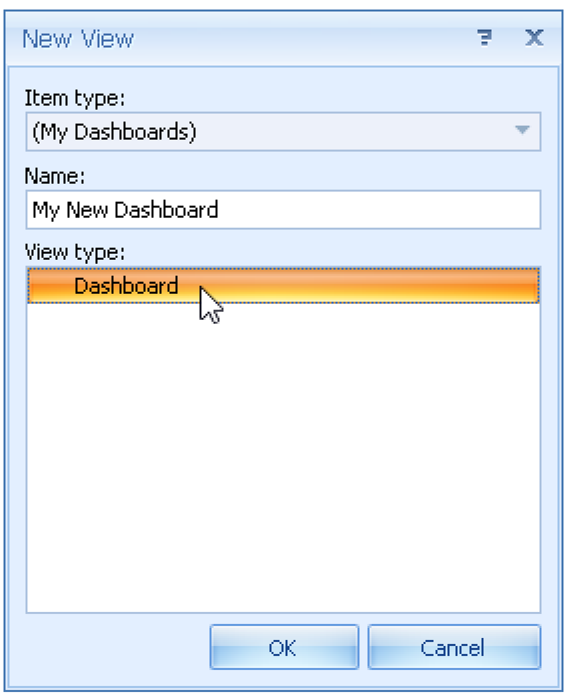
1. On the console ribbon activate the **View** tab and then click **All Views** in the **Manage** section. As an alternative, you can also right-mouse-click on the **My Dashboards** node in the Navigator and choose the **Manage All Views** menu item instead.

2. In the **All Views** dialog make sure that the **item type** in the top right corner is set to the **(My Dashboards)** option:



The All Views dialog showing dashboards

3. Click on the **New** button in the toolbar to create a new dashboard view:



The New View dialog for creating a new dashboard view

4. Press the **OK** button to show the configuration dialog for dashboard views.

5. After.you have configured your dashboard view and pressed the **OK** button your newly added view will be shown in the navigator underneath the **My Dashboards** node and also in the **All Views** dialog.

Remove Dashboard Views

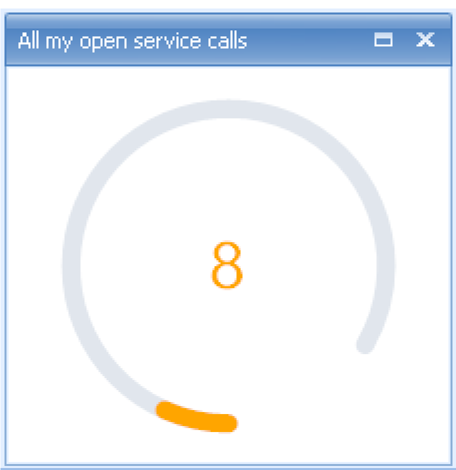
NOTE: You cannot remove the **My Tasks** dashboard view.

To remove a dashboard view do the following:

1. On the console ribbon activate the **View** tab and then click **All Views** in the **Manage** section. As an alternative, you can also right-mouse-click on the **My Dashboards** node in the Navigator and choose the **Manage All Views** menu item instead.
2. In the **All Views** dialog make sure that the **item type** in the top right corner is set to the **(My Dashboards)** option.
3. Select the dashboard view that you want to remove.
4. Click the **Delete** button in the toolbar.

4.12 Gauge Views

A gauge view allows you to create an aggregated measurement on a certain item type in your system. For example, you can count the number of service calls that are assigned to you or to your workgroup:



Unlike other types of views (like table, chart, explorer, etc), gauge views are not standalone views and can only be part of a dashboard view and therefore will not be shown in the navigation pane.

NOTE: In the current release a gauge are only capable to COUNT information in your system. In a future release this will be extended with other aggregated functions like AVERAGE, SUM, MAX and MIN.

Add or Modify a Gauge View

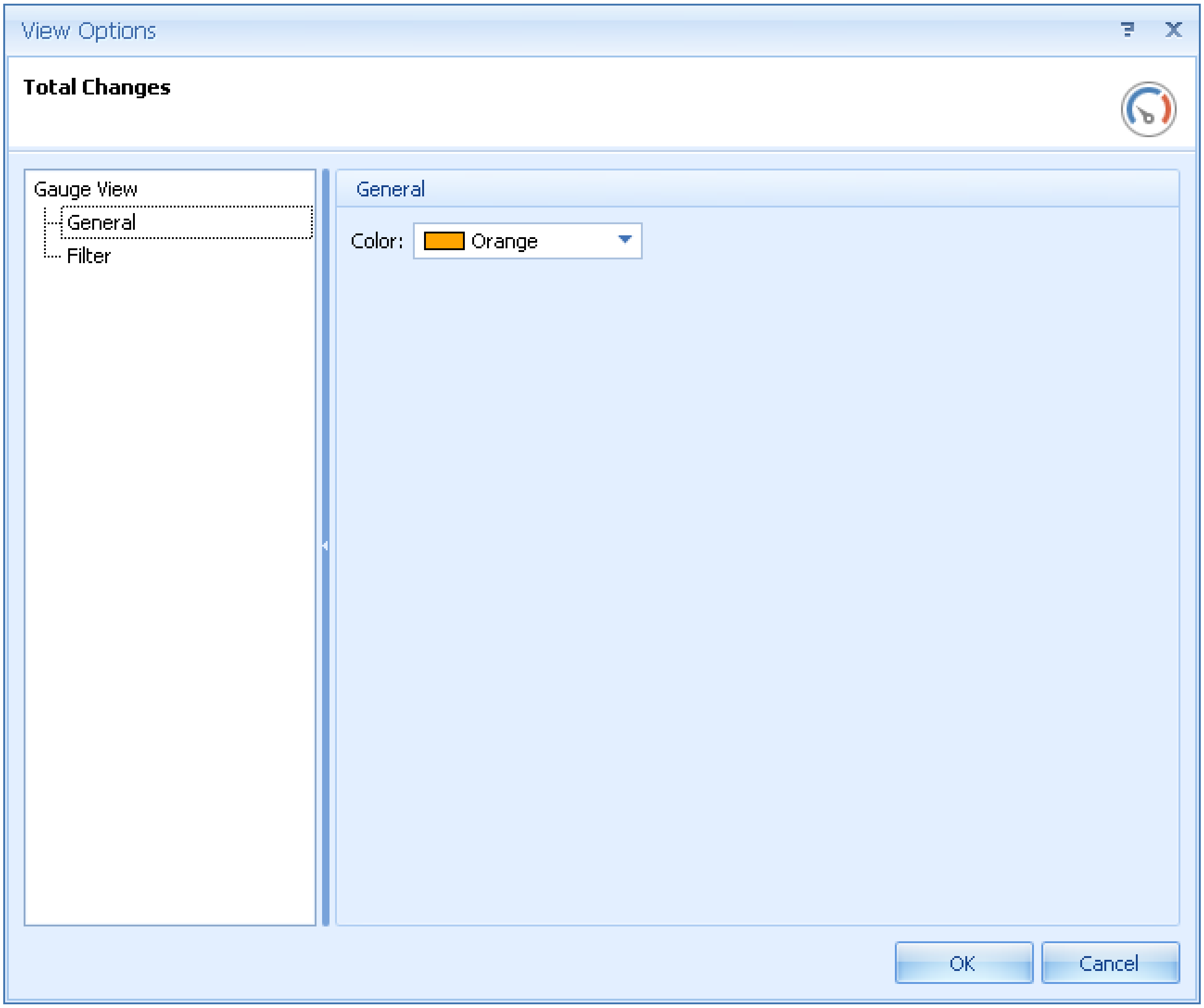
Adding or modifying a gauge view can be done either using the configuration dialog of a dashboard view (this is the recommended way), or using the **All Views** dialog.

Remove a Gauge View

When you remove a gauge view from the configuration of a dashboard view, then only the reference to the gauge view will be removed; the configuration for the gauge view itself will be preserved. Use the **All Views** dialog to delete the gauge view entirely from your system.

Configuration

The configuration of a gauge view is very simple. Currently all that is needed are a filter and a color.


View Options
Total Changes
Gauge View
General
Filter
General
Color:
Orange
OK
Cancel

5 Using Forms

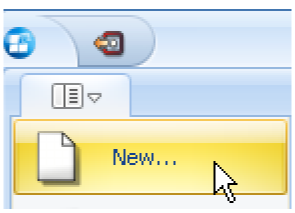
Now that you know where to find the information. We can now go into detail. The details are found in forms. In this chapter you will learn how to open a form and change the information.

5.1 Set the Default Form

When you open a form from a view, the default form is used to show you the item. One form may have fewer fields, but reacts quickly and contains just the right fields for the task. Another form may have the right fields in the main page, and lesser used fields in the tab pages. Each form is better suited for a specific situation. Forms may be created for a specific task, or you may have a preference for a certain form that allows you to quickly find what you need.

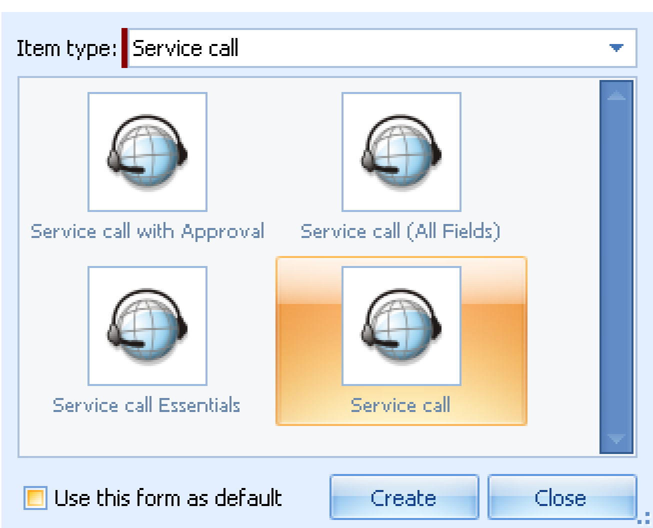
To set de default form, do the following;

1. Navigate to a view of the item for which you want to set the default form.
2. Open the application menu, choose **New**.



Set the default form through the application menu

3. In the **New Item** dialog box, the default form will be high lighted. Select the form you want to set as the new default form.
4. In the lower left hand corner of the New Item dialog box, select the **Use this form as default** check box.



Use this form as default in the lower left hand corner

5. Click **Close**.

The new form is now set as the default form. The next time you open an item, the new default form will be used.

You can open the **New Item** dialog box in the following alternative ways:

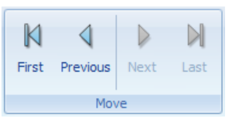
- In the console from the **Home** tab, open the **New** list and choose **Choose Form...**.
- In a form of the item for which you want to change the default form.
  - Open the application menu, choose **New...**.
  - From the **Home** tab, open the **New** list, **Choose Form...**.

5.2 Navigating Items in Forms

You open a form from a table view. A table view displays many more items than just one. You can move from one item to the next item in the table view without closing the form.

Items In Forms

To move to the next item in the table view from the form, click **Next** in the **Move** group in the form's **Home** tab.



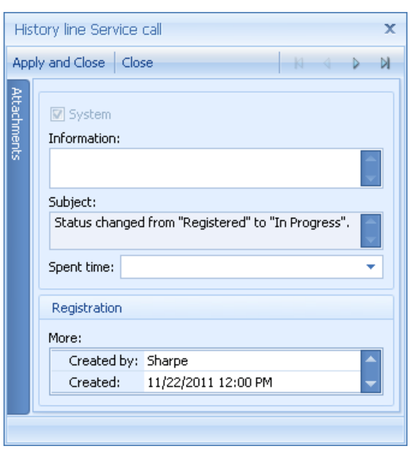
Move command group

In the same **Move** group you can move to the previous, first and last item of the list in the table view.

When you move to another item, the system will attempt to save the item you leave. Even if you did not change any field yourself, automatic rules may have changed values. If any field is changed while moving to another item, a warning about unsaved items is shown.

History Lines

Items are shown in forms and have the above navigation in the form. History lines are shown in History Line windows. History Line windows have a similar navigation box in the upper right hand corner as forms.



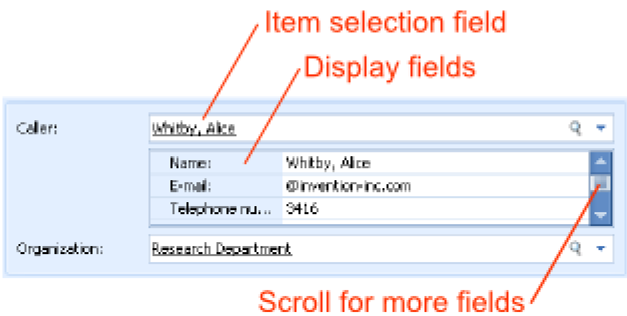
Service Call history lines

5.3 Understanding the Information in a Form

PROLIN Smart Client forms are power houses of information. To give the quickest overview of the information in an item, look for the following.

Display fields

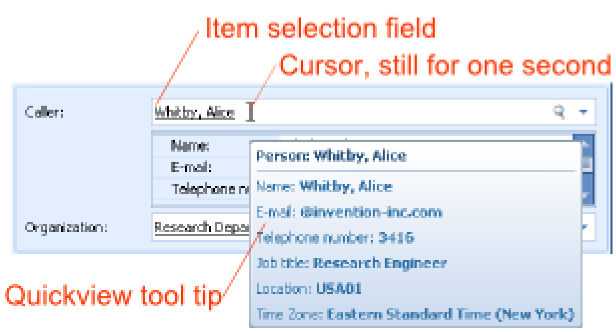
Information from a related item, such as the caller of a Service Call, or a history line, may be displayed in display fields. While the main information is found in the field itself, below that field is a list with information from the item selected in the field. Notice the scroll bar on the right hand side of the display field, there may be more lines available than shown at once.



Example caller display fields in a service call

Quickview tooltip

In addition to display fields, which take space in your form, the quickview tool tip will give information about the related item. The quickview tool tip also gives information for items of which the display fields are not activated. Hover your mouse over the item field for a second and the quickview tool tip appears below the cursor.

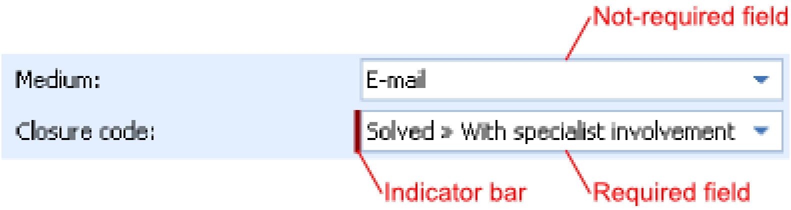


Quickview tool tip for caller in service call

5.4 Required Fields

Some fields may be required. Fields may be required because the values are needed in the process for the item. Fields may also be necessary because the values are used to create relations with other items. Either way, a required field must have a value before you save or close the form.

You can recognize a required field by the thicker left hand border of the field edit box. The indicating border is usually red, but the color can be set in the User Options. See Changing Appearance.



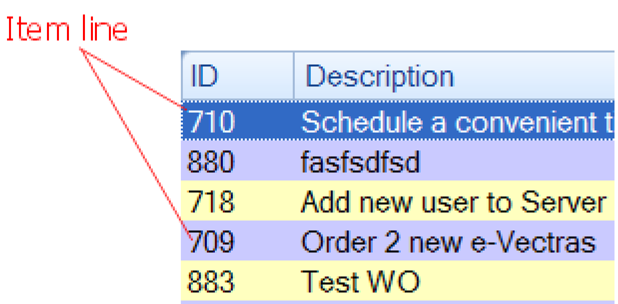
Required Field with Inidcator Bar

5.5 Opening an Item in a Form

Forms provide you the details of an item. Depending on your authorizations the form also allows you to change field values of items.

To open an item in a form do one of the following.

- Double click an item line in a table view.
- Right click on an item line in a table view and choose **Open** from the context menu.
- Select an item line in a table view, then choose **Open Selection** in the **Item** group of the **Home** tab.
- Select an item line in a table view, then press **Enter** on the keyboard.
- Select an item then press **CTRL** and press **ARROW DOWN** to select multiple items, then press **Enter** to open all selected items.

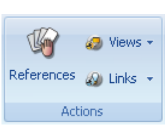


Item lines in a table view

See also Navigating Items In Forms.

5.6 Starting Form Actions

Smart Actions are powerful ways of enhancing PROLIN Smart Client with commonly available applications. For example, it is easy to use Notepad to take quick notes. Notepad can be used in a Smart Action and made available in all forms. You start actions from the **Actions** group in a form.



Actions group

Link Actions

The Notepad example would be created as a Link Action. A Link action is a Smart Action that uses other applications and can send basic information from PROLIN Smart Client to the used application. For example, imagine you use a Notepad action in a configuration item. The configuration item is named "HP Laserjet 5". When you start the Notepad action, a text file will be created with the name *HP Laserjet 5.txt*. Before you can use a Link action the system administrator must create the Link action and make it available to you.

To start a Link action do the following:

1. Open an item in a form.
2. Click **Links** in the **Action** group in the form's **Home** tab.
3. From the **Links** menu choose an action.

View Actions

When you use a View action, a view will be opened that shows information related to the item in the form. For example, imagine you are working on a Configuration Item named "HP Laserjet 5" and you want to see any Problems pertaining to this configuration item. Problems may be directly related to Configuration Items, and Problems can be related to Service Calls, Incidents and Changes as well. You may be able to simply find the Problems related to the Configuration Item, but now you want to see the Problems related to any of the Service Calls and Incidents related to the Configuration Item. In the configuration item there is a list of Calls and Incidents related to the Configuration Item. You would have to open each Service Call and Incident to see if there is a Problem created and open. A View action makes life easy. A View could be created that shows Problems related to Service Calls or Incidents that are registered against a Configuration Item. The View Action adds the name of the Configuration Item to the filter of the created View.

The View action's result can be any kind of View (table view, chart view, etc.). The View action's result is shown in a action window. You can use the View action's result just like any other View, and you can place it just like any action window in the form. When you navigate the form to another item (**First**, **Previous**, **Next**, **Last** in the **Move** group) the View action's result will be updated for the new item. View actions are powerful tools for getting all the information you need.

Before you can use a View action the system administrator must create the View action and make it available to you.

To start a View action do the following:

1. Open an item in a form.
2. Click **Views** in the **Action** group in the form's **Home** tab.
3. From the **Views** menu choose an action.

See also:

- Navigating Items In Forms
- Using Action Windows
- Moving Action Windows

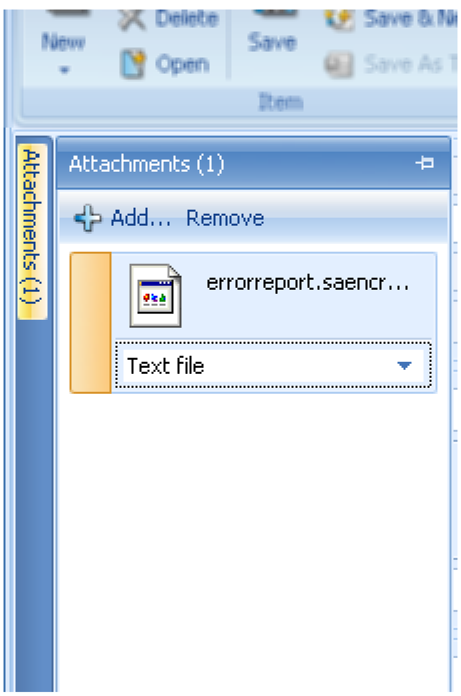
5.7 Managing Attachments in a Form

Items often have to be documented with information that is best presented in its own format. For example, a Service Call could be documented with a screen dump of an error situation, Configuration Items could be documented with a PDF file containing manufacturer's troubleshooting information. Picture files, PDF files and virtually any other file format can be stored as attachment. The time it takes to open an attachment depends on the size of the file and the speed of the network.

You will find attached files in the Attachment window. The attachment window is an action window. Usually the Attachment window is scrolled up to side of the form.

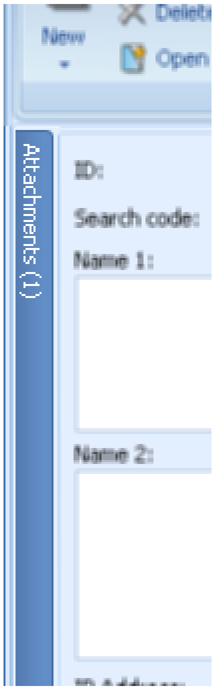
To add an attachment do the following:

1. Open an item in a form.
2. Click **Attachments** in the form's **Home** tab.
3. The **Attachment** window is now scrolled open and pinned down.
4. Click **Add** in the **Attachment** window.
5. A **File** dialog is opened, locate the file you want as attachment.
6. In the **File** dialog click **Open**.
7. The file is now attached to the item and a copy will be uploaded when the item is saved.
8. Select the attachment and from the classification list select an appropriate classification.



Choose an attachment classification

NOTE : Notice how the **Attachments** window name bar shows the number of files attached to the item.



This item has one attachment

To remove an attachment do the following:

1. Open an item in a form.
2. Click **Attachments** in the form's **Home** tab.
3. The **Attachment** window is now scrolled open and pinned down.
4. Select the attachment you want to remove.
5. Click **Remove** in the **Attachment** window.
6. The file is now marked to be removed and will be removed when the item is saved.

If the attachment server is not available, then you will see a problem notification at the bottom of the Attachment window. In case of a problem, you will not be able to save the attachment.

PROLIN Smart Client can print reports to many formats, also to PDF. Problem documentation can benefit from regular reports of the chart or view used to analyze the Problem.

See also:

- Using Action Windows
- Moving Action Windows

5.8 Entering Information

A form is used to enter and present information. The fields have different types and each type of information entered must be entered correctly to have value in the processes. PROLIN Smart Client provides numerous tools to enter correct values in the fields. In this section you will learn about the tools available for the various field types.

When you enter invalid information into a field, the field will change appearance. The following image shows a date field with invalid data.

A Field with invalid information entered

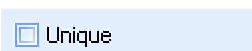
If a form contains invalid information, a warning will be shown when you try to save the item. You can then discard the invalid information or return to the form to correct the information.

5.8.1 Selecting Options

Options, or more generally speaking, Boolean fields can have various forms. Options can have only two values; the option is selected or not. The predefined option field is shown as a checkbox.

To select an option, do one of the following.

- Checkbox. Click the check box. A check mark will be shown when the option is selected.
- Radio button. Click the button. The button will appear pressed when the option is selected.
- Yes/No selection. Choose the option from the field's value list.
- True/False selection Choose the option from the fields' value list.



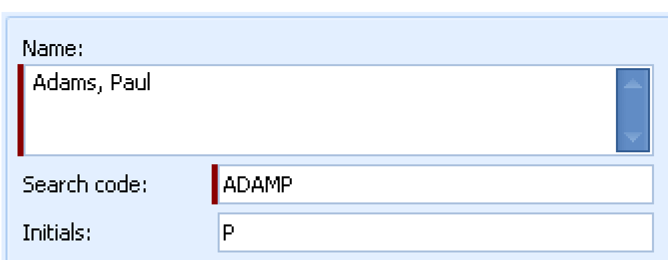
Option field as a check box

5.8.2 Entering Text

Text fields come in a variety of lengths. Shorter text fields are shown as a one row text box, while longer text fields are shown as a multi-row text box with possibly a scroll bar.

Text fields can contain any character determined by the character sets on your computer and the database. The database must be configured to contain Unicode to enter Unicode characters.

In single-line text fields, press ***Enter*** to move to the next field. In multi-line text fields, press ***Enter*** to start a new line.



Multi-line text field (above) and single-line text fields (lower two)

5.8.3 Entering Monetary Values

Monetary or currency values are numeric values. Enter a monetary value by entering a number. When you leave the field, the number will be formatted as currency.

Open the monetary value list and a calculator will appear. The calculator allows easy entering of values.

Monetary fields with calculator

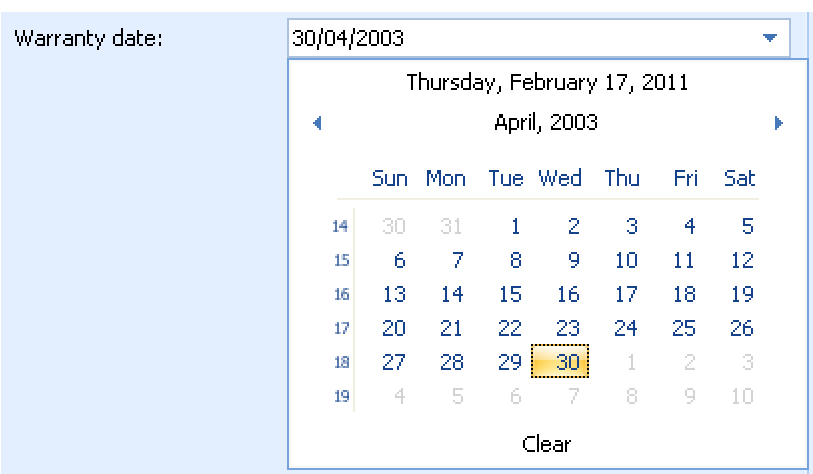
In the above picture, a value of $1,000 is being entered in the **Planned Cost** field. The **Planned Cost (Alternative)** field is formatted as U.S. dollars.

The **Planned Cost** field is formatted with the primary currency format. The **Planned Cost (Alternative)** field is a conversion of the **Planned Cost** field and is formatted according to the secondary currency format. What currency the primary and secondary currencies are depends on the system settings for currencies.

5.8.4 Entering Date and Time Fields

Date fields contain a specific day from the calendar. Date-time fields contain a specific time of a day from the calendar.

To set a date field, either type the date in the correct format or select the date in the calendar box. To change the month click an arrow left or right of the name of the month and year. Alternatively, click on the name of the month and year. A list of months in the year appears, now select the month. To change the year, click on the name of the month and year, a list of months in the year appears, now click the arrows left or right of the year number. To change the year by ten years at a time, click the number of the year above the month list, a list of years appears, now click the arrows left or right of the year range.

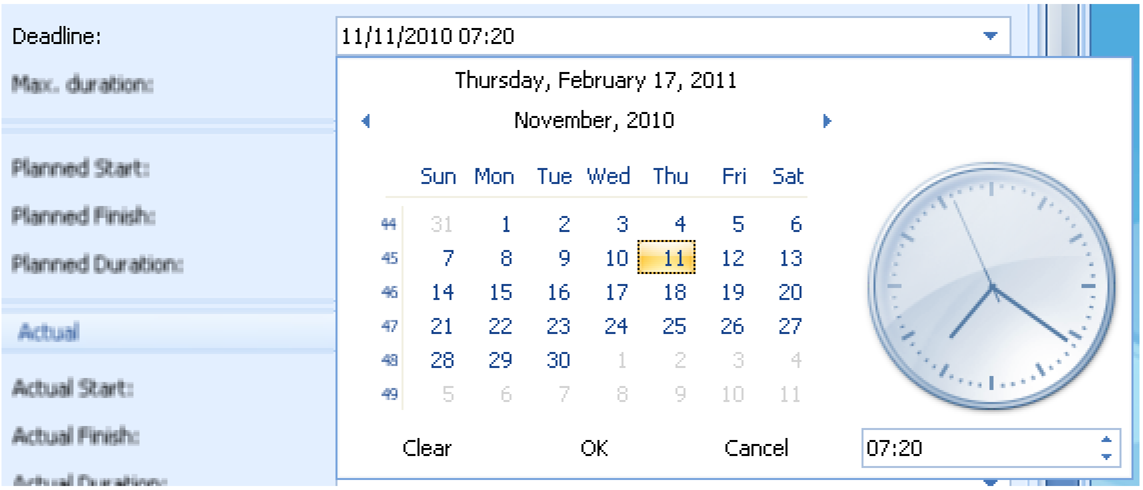


Select the date from the drop down calenar

Relative dates can be entered in the date field. For example, to enter tomorrow as a value type *+1* in the field. Yesterday can be entered as *-1* .When you leave the field, the correct date will be shown. In a date field you can enter relative dates as whole numbers preceded by a plus or minus sign.

For a date-time field, the calendar box also contains a clock. The calendar works the same as the calendar for the date field. To change the hours in the clock, double click the hour value and click the arrows up or down. To change the minutes in the clock, double click the minute value and click the arrows up and down.

Once you have set the date and time, click **OK** to return the changed value to the field.



Set the date and time

Relative dates can be entered in the date-time field. For example, to enter tomorrow as a value type *+1* in the field. Yesterday can be entered as *-1* .When you leave the field, the correct date will be shown. In a date-time field you can enter relative dates as whole numbers preceded by a plus or minus sign.

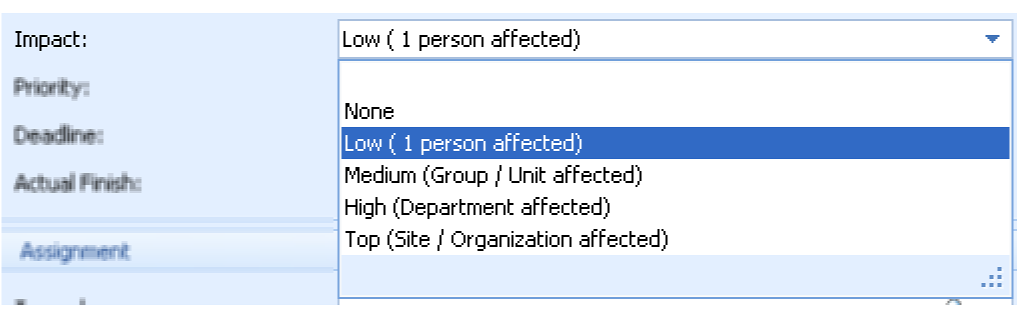
5.8.5 Selecting Codes

Code values can have two forms, a list or a hierarchy (tree). Both are easiest selected from the code value list.

A list of code values may also be shown as a set of radio options.

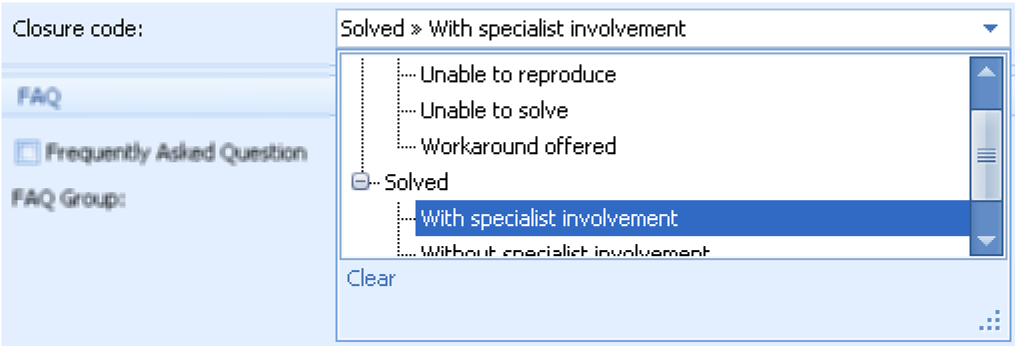
Click the value to select a code

To select a code from a list, open the code selection list and choose the code value. Change the size of the code selection list to see more values. To change the size of the code selection list, open the list and click and drag the lower right hand corner of the list.



Resizable code list

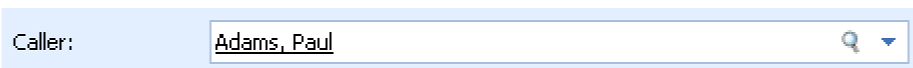
To select a code from a hierarchy, open the code selection list and choose the code value. The hierarchical code selection lists can be resized too. For easy overview, branches in the code tree can be expanded and collapsed. To expand a branch, click on the plus sign. To collapse a branch, click the minus sign.



Resizable hierarchical code list

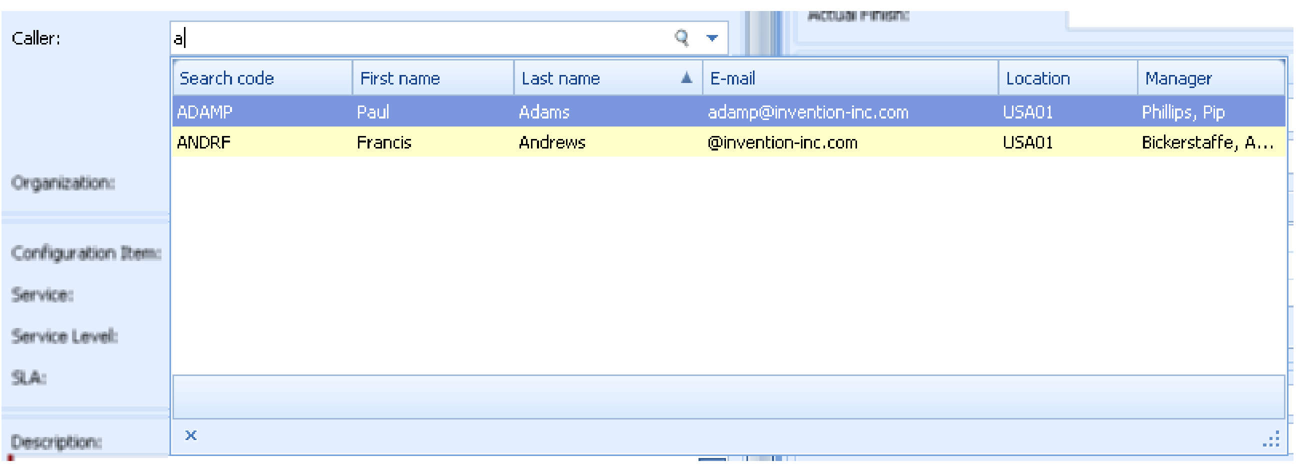
5.8.6 Entering Information in a Lookup Field

Relations to another item are entered in a Lookup field. Lookup fields have a magnifying glass and a Lookup field menu at the right end of the field.



A lookup field

To enter a value in the Lookup field, start typing in the field. When PROLIN Smart Client has multiple suggestions for the value a list will be shown and you can select a value from the list. Continue typing and when only one item can be suggested from the typed part, the found value will be entered in the field. This function is called the auto complete function. The auto complete function searches for suggestions based on the search codes of related items.



Lookup field with auto complete

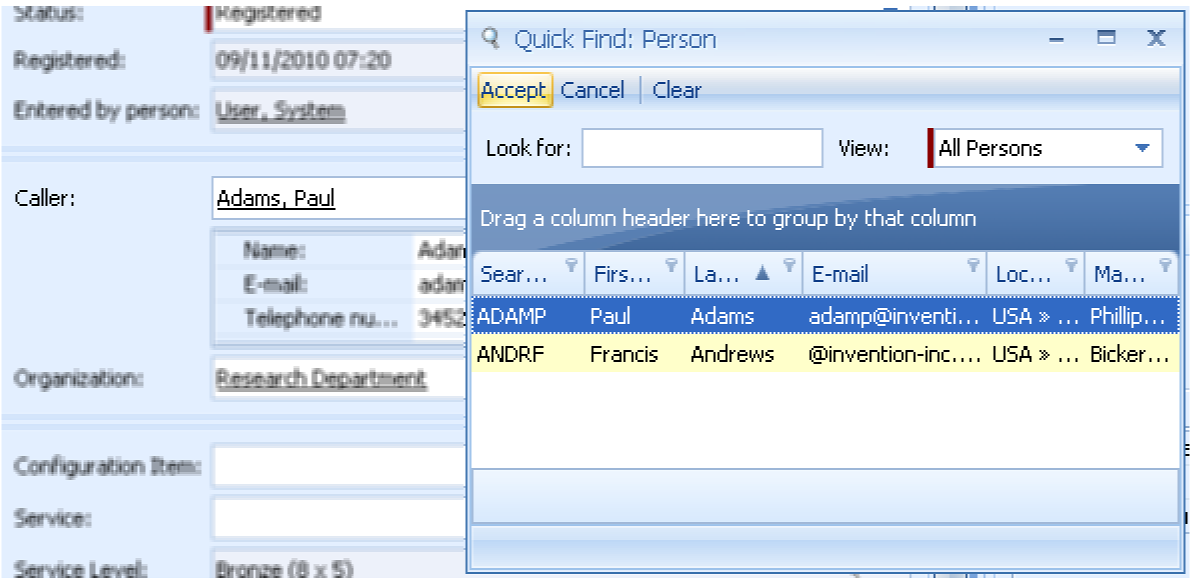
Click on the magnifying glass, this will open **Quick Find**. Select an item in the view and click **Accept** in the **Quick Find** to return the selected item to the Lookup field. Double clicking an item in the view will also return the item to the Lookup field.

When you first open **Quick Find**, items are shown in the default Quick Find view. To change the view, select another view from the **View** list. The types of views that can be selected in Quick Find include table views and explorer views.

Start typing a value in the **Look for** field and the Quick Find will make the selection more specific, showing those items of which the left column starts with the characters in the **Look for** field. You can click and drag a column header to the left most position to look for items based on the new column.

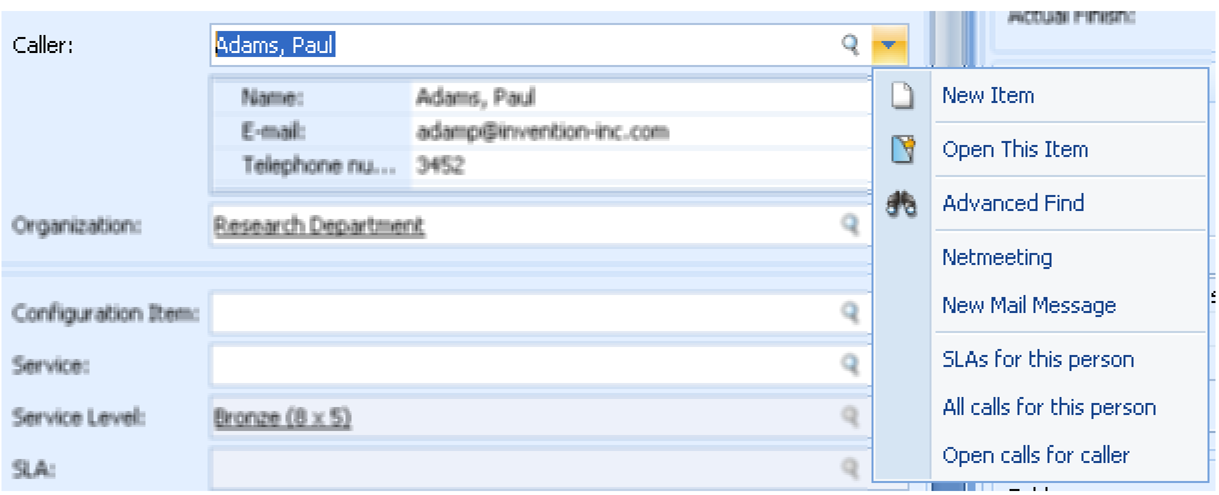
Click **Clear** to clear the **Look for** field and show all items in the view again.

Click **Cancel** to close the **Quick Find** without returning a selected item to the Lookup field.



Select the item in the quick find and click Accept

To create a new item and return the new item to the Lookup field, open the Lookup menu and choose **New**. The lookup menu also contains tools and actions that are useful for the given field.



The Lookup menu

Using a Lookup field, you create a relation from one item to another item. The item you make a relation with, may have many relations. For example, you can relate a Service Call to a Person in the **Caller** Lookup field. There is one Person in the **Caller** Lookup field. However, in the Person form there will be a list of Service Calls for which the Person is related as a caller. This is called a one-to-many relation, one Person may be related to many Service Calls. Not all one-to-many relations can be seen from both sides.

5.9 Creating and Changing Relations

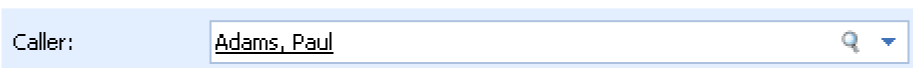
Relations contain important information about an item. For example, the relation between a Service Call and a Person tells for which Person the Service Call is created and so the relation provides the information who to call for more information about the issue described in the Service Call.

There are three distinct relations in PROLIN Smart Client and each type of relation carries a different type of information. The relation between a Service Call and a Person is a *one-to-many* relation. Many Service Calls may be created for one Person. One Person may be the user of many CIs. One desktop may have only one user, but some CIs such a printers have many Persons as users. The relation between a Person and a CI is a *many-to-many* relation. Then there is also the Generic relation, this is a special *one-to-one* relation. With a Generic relation you can relate one item to one other item. The generic relations are defined by your company.

In the following sections you will learn about the different relations, what they look like, how to create them and how to change them.

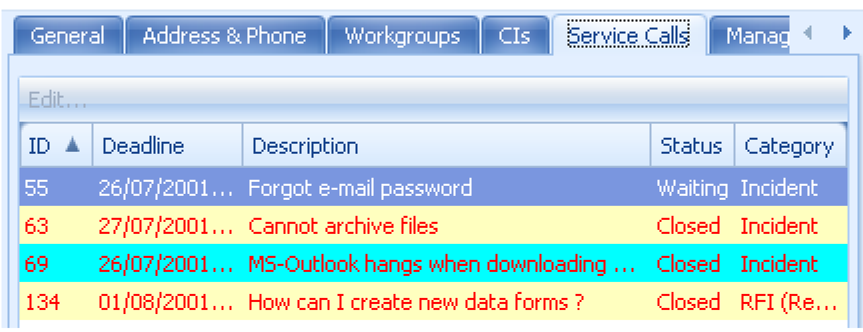
5.9.1 One-To-Many Relations

One-to-many relations look different from either side of the relation. The Service Call to Person relation is a many-to-one relation. In the Service Call you will find this relation in the **Caller** Lookup field:



The Person-Service Call relation in the Service Call form

From the Person item perspective you will find this (one-to-many) relation in a list of Service Calls:



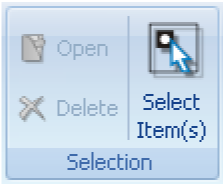
The Person-Service Call relation in the Person form

To enter information in a Lookup field, see Entering Information in a Lookup Field

In a list of relations, you can create a relation with a new item or you can create a relation to an existing item.

To create a relation to a new item, click **Add** at the top of the relations list. The default form for creating new items will appear. See Creating an Item for more information about different ways of creating new items.

To create a relation to an existing item, click **Add Relation** at the top of the relations list. The advanced find for the item to relate will appear. See Using Advanced Find for more information. When you have found the item you want to relate, double-click the item or click **Select Item(s)** in the Advanced Find dialog. This will return the item to the list and close the advanced find.



Click Select Item(s) in the Selection Group

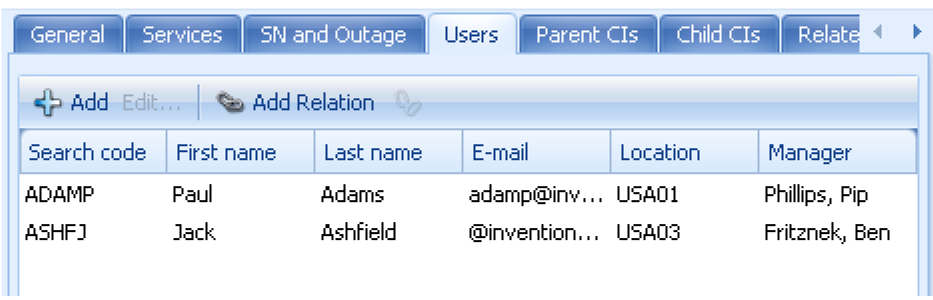
To edit the related item, select the item you want to edit and click **Edit** at the top of the relations list.

To remove the related item from the list, select the item you want to remove and click **Remove Relation** at the top of the relations list. Removing an item from a relations list does not remove the item from the system.

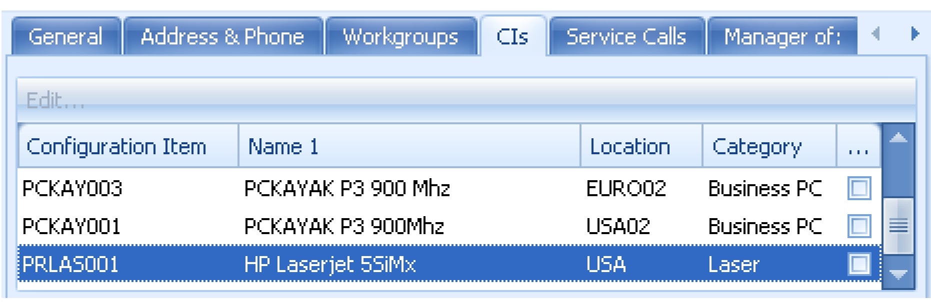
The Service Calls list in the Person form does not allow creating or changing relations. The Service Call-Caller relation is created when the Service Call is created and cannot be changed afterwards. This is a requirement of the ITIL process. Other items have similar relations that can only be created one time and cannot be changed.

5.9.2 Many-To-Many Relations

Many-to-many relations are shown in similar lists in the items on either side of the relation. In either item, the relation is shown as a list of items:



The Person-CI relation in the CI form

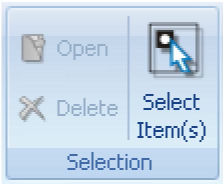


The Person-CI relation in the Person form

In a list of relations, you can create a relation with a new item or you can create a relation to an existing item.

To create a relation to a new item, click **Add** at the top of the relations list. The default form for creating new items will appear. See Creating an Item for more information about different ways of creating new items.

To create a relation to an existing item, click **Add Relation** at the top of the relations list. The advanced find for the item to relate will appear. See Using Advanced Find for more information. When you have found the item you want to relate, double-click the item or click **Select Item(s)** in the Advanced Find dialog. This will return the item to the list and close the advanced find.



Click Select Item(s) in the Selection Group

To edit the related item, select the item you want to edit and click **Edit** at the top of the relations list.

To remove the related item from the list, select the item you want to remove and click **Remove Relation** at the top of the relations list. Removing an item from a relations list does not remove the item from the system.

5.9.3 Generic Relations

Generic relations are defined within the company and support company specific processes. Relations between items carry important information about the two related items. Relations carry the information for processes. Most fixed relations in PROLIN Smart Client are used in ITIL processes. For example, Work Orders are related to Changes to show how the Change is actually executed. The configurable generic relations, can be used to fit in company specific processes.

With generic relations you may connect any item to almost any item. Some restraint must apply to avoid negative impact on performance. To fit the generic relation in the company's processes the allowed relations must first be defined. After being defined, the Generic Relations lists must be added to forms to be available to the user.

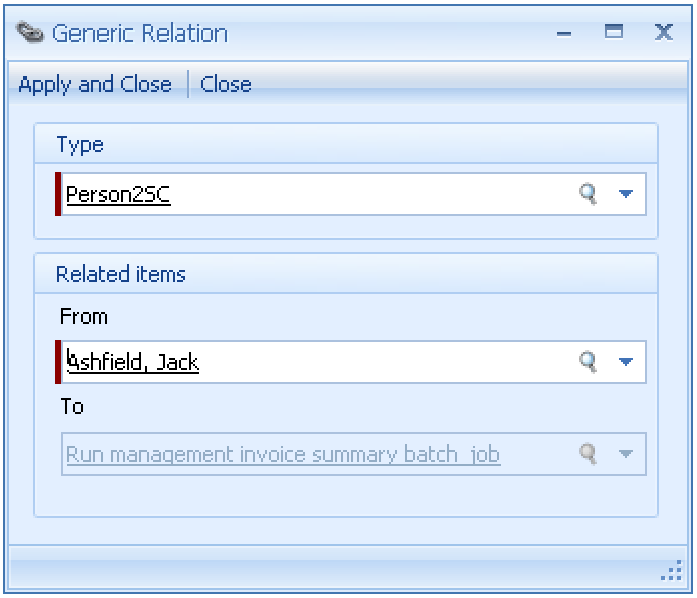
Generic Relations have a direction, incoming or outgoing. Generic Relations go from one item to another item. The relations that go out from the current item show up in another list than the items that come into the current item. The direction of a Generic Relation is again important process information.

To create or edit a Generic Relation, first find the **Generic Relations** lists. Often these lists can be found in the **Generic Relations** tab. In the following image, the list with incoming relations is at the top and the outgoing relations are at the bottom.

Lists of incoming and outgoing generic relations

- To add a generic relation, click **Add** above the list of the right direction. The **Generic Relation** dialog appears.
- To edit a generic relation, select the relation in the list and click **Edit** above the list. The **Generic Relation** dialog appears.

- To remove a generic relation, select the relation in the list and click **Remove** above the list.



Dialog for adding or editing generic relations

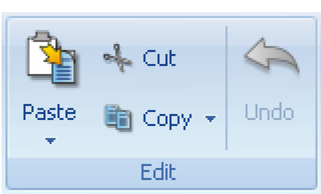
The current item is preselected and grayed out in the **Generic Relation** dialog. In the **Generic Relation** dialog you can change the generic relation as follows.

1. Choose the type of generic relation from the **Type** list. The type of generic relation determines the type of item that can be selected as the related item.
2. Choose an item in the **Related Items** section of the dialog. In an incoming relation you can select an item in the **From** field, in an outgoing relation you can select and item in the **To** field.
3. Click **Apply and Close** to save the relation or click **Close** to discard the changes.

5.10 Copying Item Information

To copy information from an item in a form, do the following:

1. Open the form and select the value in a field.
2. From the **Edit** group in the **Home** tab, click **Copy**. Alternatively press ***CTRL+C*** on the keyboard.



The Edit group in a form

3. To paste the information, switch to another application or to another field that can contain the copied information. Place the cursor in the field and click **Paste** in the **Edit** group. Alternatively, press ***CTRL+V*** on the keyboard or use the paste functionality of the other application.

NOTE : The **Copy** menu contains predefined actions to create new items from copied information. See [Copy Information to a New Item].

5.11 Text Snippets

Text Snippets are available in PROLIN Smart Client 2016 R9 and later.

5.11.1 What are Text Snippets

Text Snippets are pieces of text that can be saved and reused in text fields in forms. They can be very useful if you want to use standardized pieces of text (for instance for communication to the caller) and don't want to type the same text over and over again.

They are stored locally on a computer where PROLIN Smart Client runs. The location where they are stored is: **C:\Users\[USERNAME]\AppData\Roaming\PROLIN Inc\PROLIN Smart Client\11** in a file named **snippets.dat**.

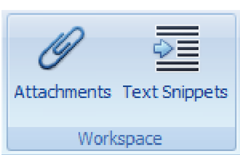
If you want to share Text Snippets you can distribute the snippets.dat file to other users.

5.11.2 How to use Text Snippets

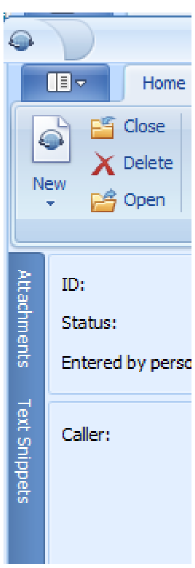
Text Snippets are available per user. Every user can have its own texts or a standard file can be shared amongst several users. They are usable in all forms, not linked to specific entity.

There are three ways to start the Text Snippets dialog:

1. Click on the Text Snippets button on the toolbar

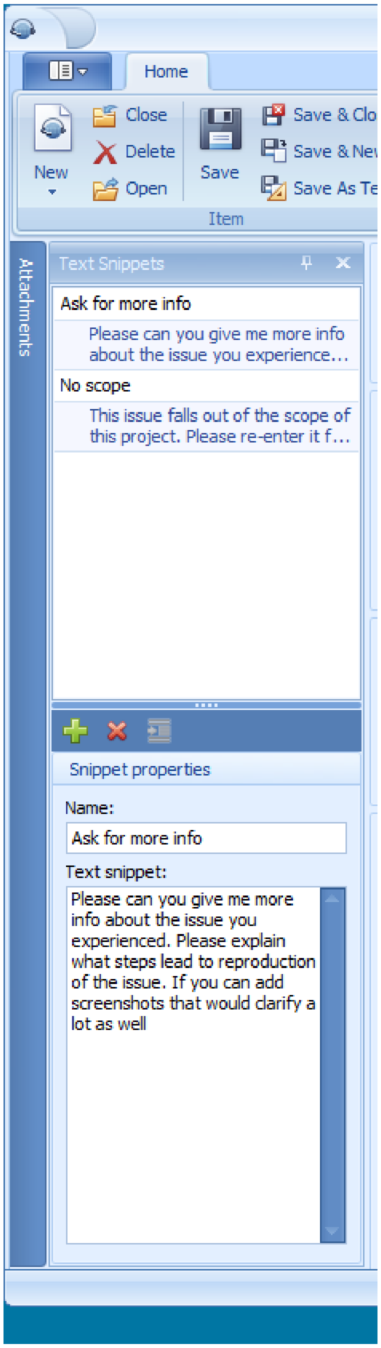


2. Click on the Text Snippets button on the side bar



3. Press Ctrl-T when you are in a text field

Since it is a general tool window the Text Snippets dialog can be pinned to stay available or even undocked from its location (similar to the Attachments pane).



Add a text to the Text Snippets list

Open the Text Snippet dialog. Click on the "+" button. You can now enter a name to identify the Text Snippet and the text itself. The Text Snippets are stored automatically. You don't need to press a button to save.

Modify a Text Snippet

Open the Text Snippet dialog. Select the Text Snippet you want to modify from the list. The values are shown in the details at the bottom of the dialog. You can modify the text. The Text Snippets are stored automatically. You don't need to press a button to save.

Delete a Text Snippet

Open the Text Snippet dialog. Select the Text Snippet you want to delete from the list. Click on the "X" button.

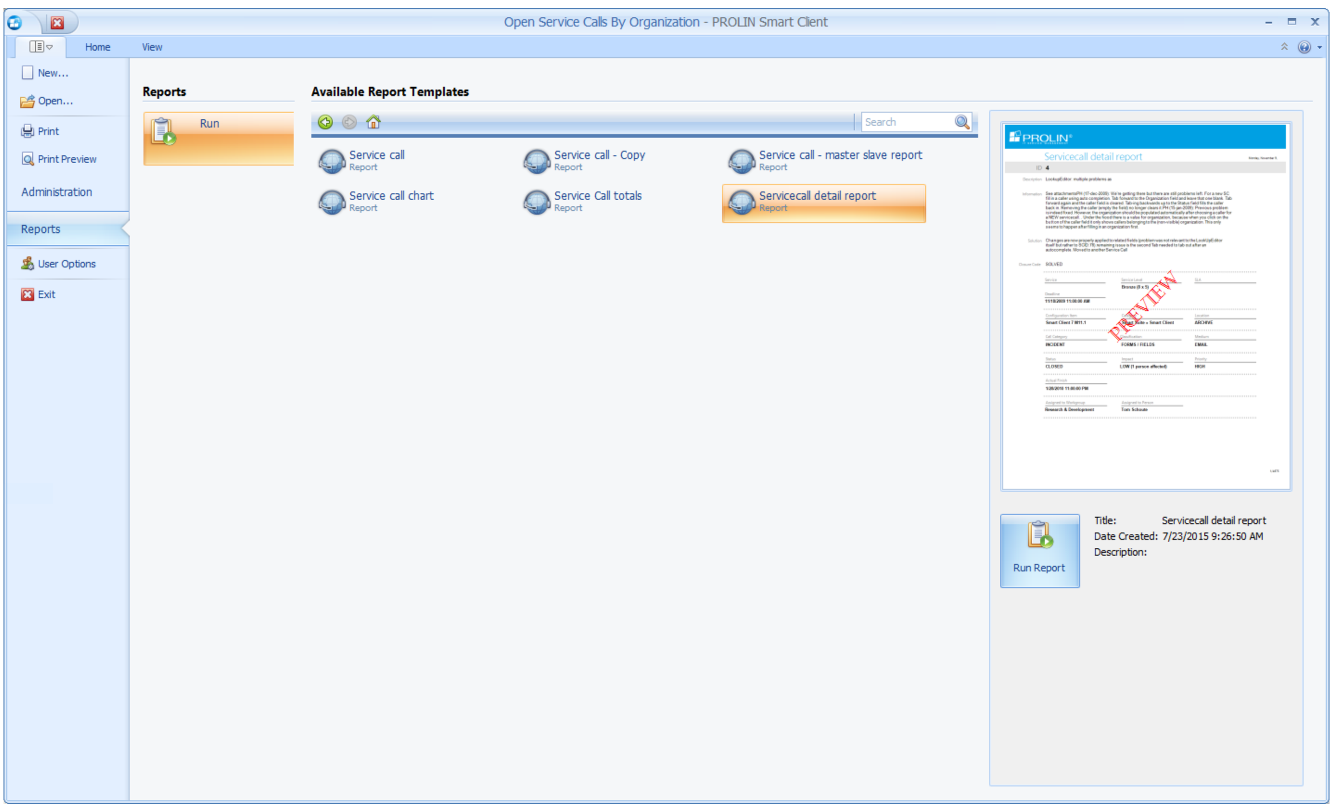
6 Smart Reporting

The PROLIN Smart Reporting module in PROLIN Smart Suite enables customers to create nicely formatted reports using all available fields and existing filter functions. These reports can be shared with all end users via PROLIN Power Server.

In this chapter you learn how to create, run and share reports. You will also learn how to print a view or form and how to make pictures you can use in a presentation or you can send through e-mail by exporting the view or form.

6.1 Running Reports by End Users

All users have an option to run reports in PROLIN Smart Client. This function can be found under **Home** - **Reports**:

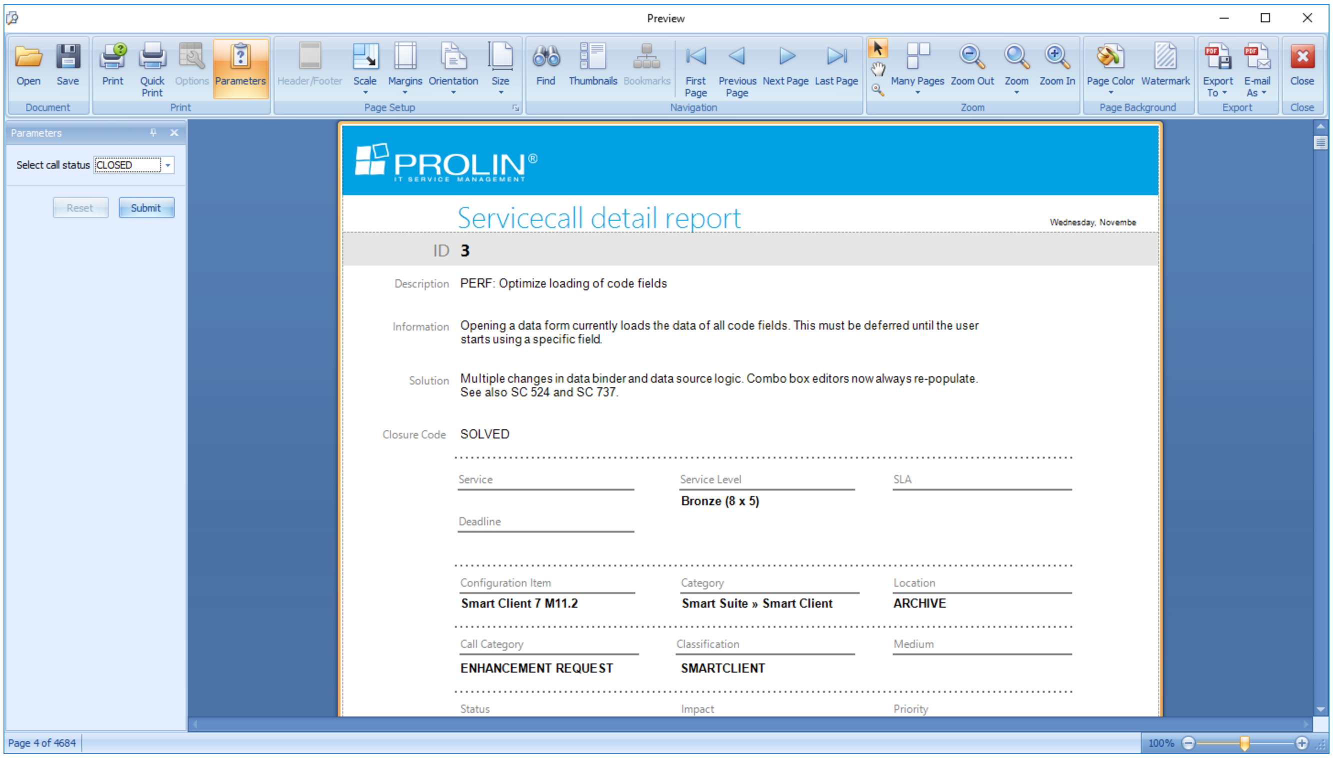


End user print function

Users can only access reports from entities they have view rights for.

In the **middle section** of the screen you can select an entity and under every entity you see the available reports. If you select a report a preview is shown at the right side of the screen. Under the preview there is some general information about the report and a button that will run the report.

After you click the **Run Report** button the following screen is shown (in this case showing the standard Servicecall detail report):



User print preview window

In this window the generated report is shown. From here it can be viewed, printed and/or exported using the functions in the ribbon.

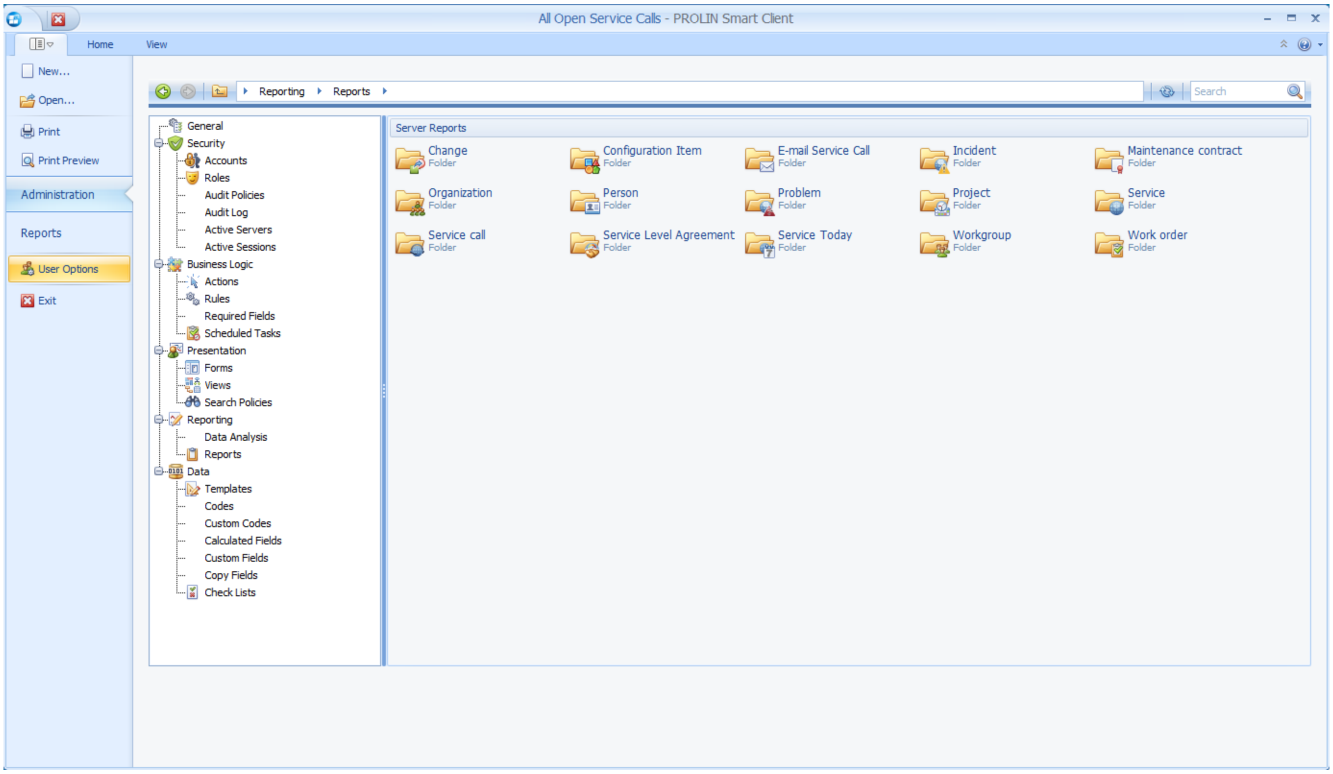
6.2 Report Designer

Creating and modifying of reports can be done using the **Report Designer** which is available in the admin client and therefore can only be done by users who are a member of the Administrator role.

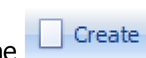
6.2.1 Start the Report Designer

To start the **Report Designer** go to **Home - Administration - Reporting - Reports**

You will get the following screen:



The main screen shows (per entity) the reports that are saved on the server.

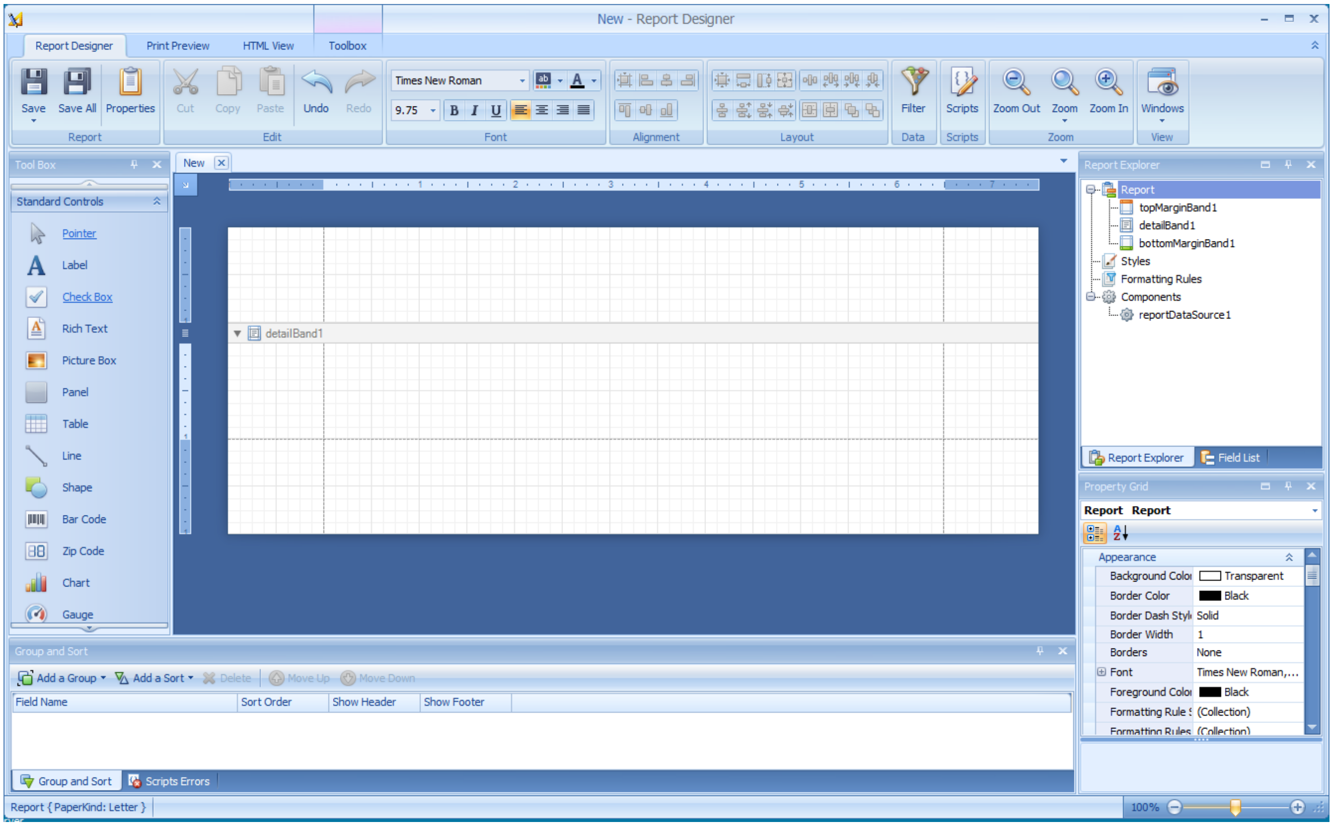
The Report Designer can be started by either double clicking on an existing report or by clicking the 

button or the 

button on the toolbar.

Reports are stored in the Smart Suite database. If you want to copy reports from one database to another you can use the Importing/Exporting Reports function.

The Report Designer looks as follows:



6.2.2 Example reports

Some example reports are distributed with PROLIN Smart Client. These can be found in: **c:\[Smart Client installation folder]\Example Reports**.

The following example reports are available:

Service call

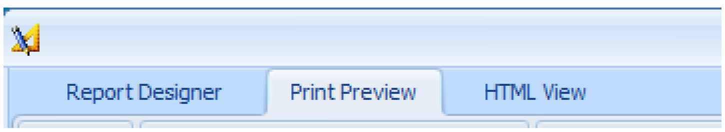
Name	**Parameters**	**Content**
Service call detail	Service call ID	Shows a single record overview of a set of service call attributes.
Service call master-detail	Service call ID	Shows per master service call the history lines and work orders linked to that service call.
Service call totals	Date created from Date created to	Shows a count of number of service calls for the selected date range per status, per priority, per assigned to workgroup.
Service call chart	Date created from Date created to	Shows a pie chart of service calls for the selected date range per category. And a set of bar charts grouped per status, showing the count per priority.

Person

Name	Parameters	Content
User - CI - CI Child	User searchcode	Shows an overview of the CI's and CI child's per users.

6.2.3 Run Reports from the Designer

In the Report Designer there are three tabs:

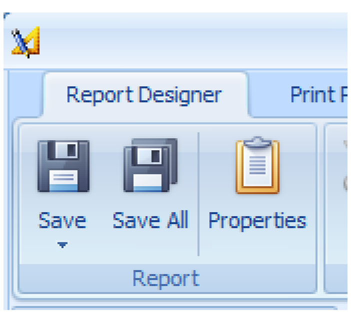


On the **Report Designer** tab you can create and define reports. When you click on either the **Print Preview** or **HTML View** tab the report is executed. The Print Preview shows how the report would look like if it is printed. The HTML View shows how the reports will look like in an HTML Browser.

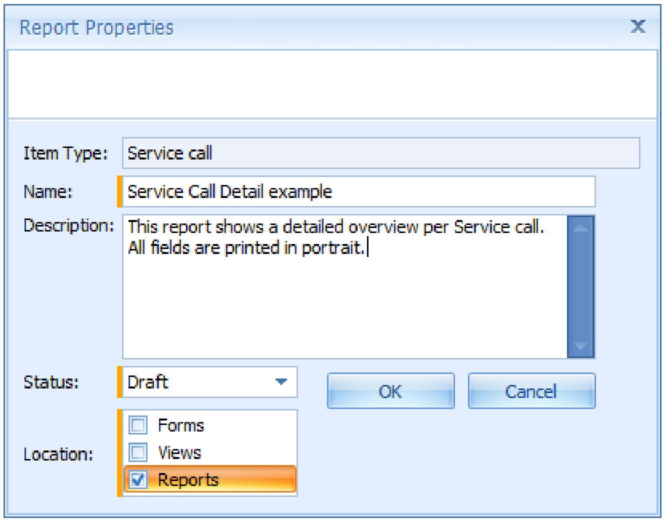
6.2.4 Save Reports

Report are saved in the database. This makes it easy to distribute reports to other users.

There are three buttons in the toolbar that control the saving of reports and the information that can be given with a report:



If you press Save in a new report (or Save As in an existing report) you will get the following dialog:



In this dialog you can specify some information of the report:

Name: The name of the report. This field is mandatory.

Description: A description of the report. This description is visible by end users if they have access to the report.

Status: Here you can choose between "Draft" or "Published". If a report has status "Draft" the report can only be seen by administrators. If the status is "Published" all users with view rights on the entity this report is created in can see the report.

Location: This controls where the report is available for end users.

Forms: the report is available from the **Print** menu in forms
Views: the report is available from the **Print** menu in views in the console
Reports: the report is available under **Home - Reports**

Reports can be made available on more than one location at the same time.

This dialog can also be opened when you click on the **Properties** button in the toolbar.

When a report has sub reports you can open them in the same designer (see Sub Reports for more information). With the **Save All** button you save all changes in all open reports.

6.3 Report Editing Basics

This chapter describes the most basic tasks you may encounter when initiating a report edit in the Report Designer.

6.3.1 Basic Operations

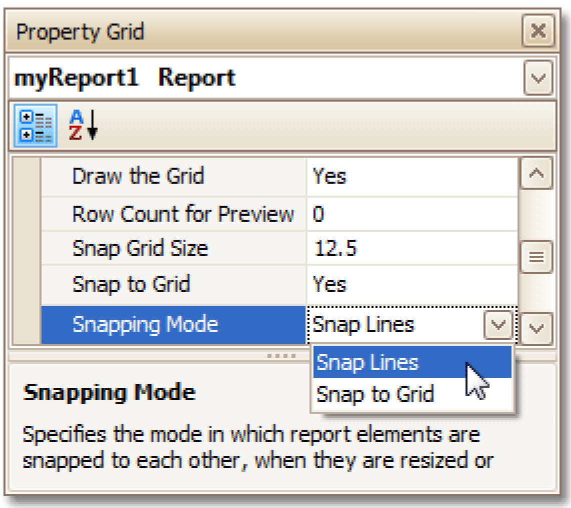
The topics in this section cover the basics of working with reports in the Report Designer.

6.3.1.1 Controls Positioning

This document describes how to easily construct professional looking reports, by precisely aligning their elements to each other. For this, the two following facilities are introduced in the Report Designer.

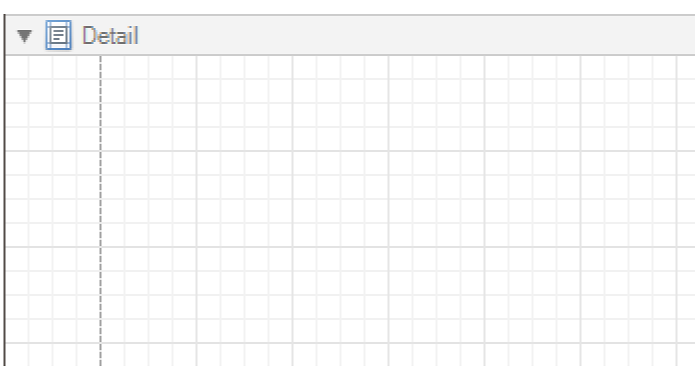
- Snap Grid
- Snap Lines

You can choose which mode to use for controls alignment within your report, by setting its **Snapping Mode**.

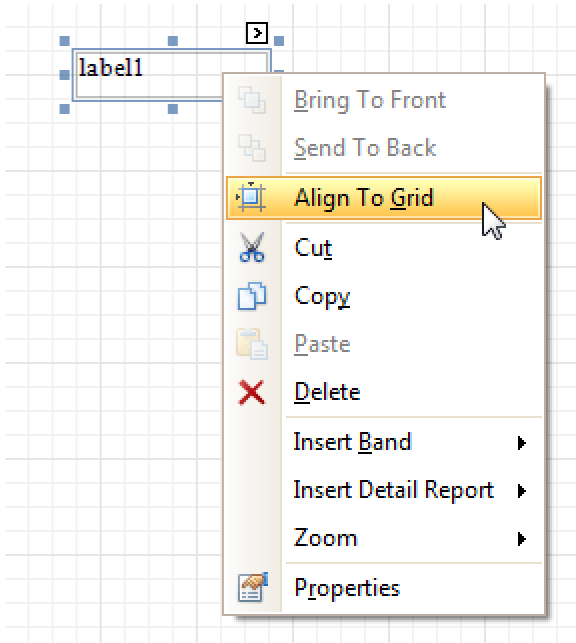


Snap Grid

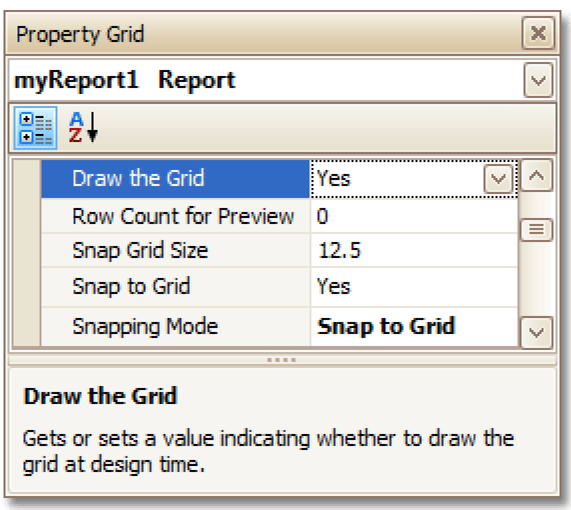
When a report is being designed in the Design Panel, it is lined up by the Snap Grid. This helps to establish the distance between report elements, and to precisely align them to each other.



To quickly align a control to the report's Snap Grid, right click the control, and in the invoked Context Menu, click **Align To Grid**.



You can choose whether the Snap Grid should be visible, by selecting your report, and setting the **Draw the Grid** option in the Property Grid.



You also can adjust the **Snap Grid Size**, which is measured in the measurement units set for your report.

The **Snap to Grid** option specifies whether controls are snapped to the Grid when they are moved as usual (with no additional keys being hold down). When the **Snap to Grid** option is enabled, the default move behavior works in the following way.

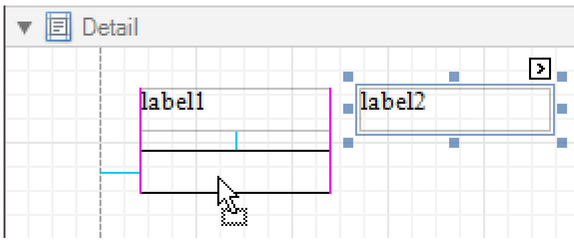
- For controls to be aligned to the Snap Grid while being moved:
  - Using the keyboard: move them using the ARROW keys.
  - Using the mouse: move them as usual.

- For controls to ignore the Snap Grid while being moved:
  - Using the keyboard: move them using ARROW keys while hold down CTRL.
  - Using the mouse: move them while hold down ALT.

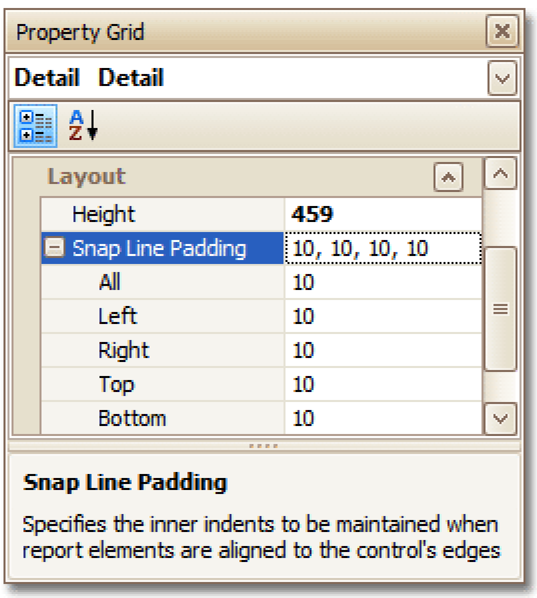
Disabling the **Snap to Grid** option swaps the default manipulation to its opposite (you should press CTRL or ALT, to enable the Grid snapping).

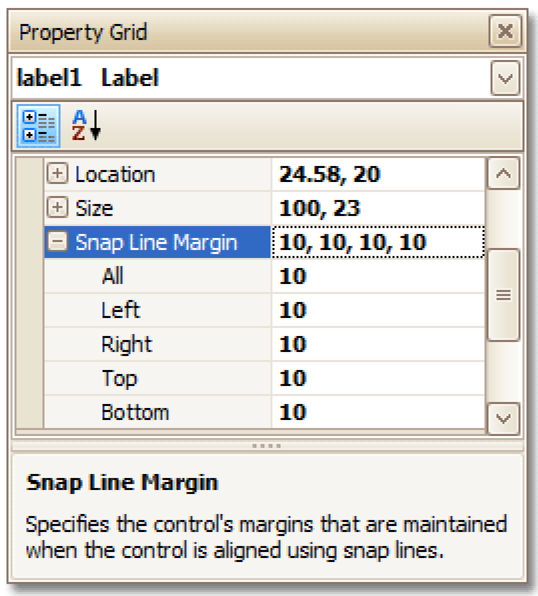
Snap Lines

Instead of the Snap Grid for control positioning and alignment, you can utilize the **Snap Lines**. These are guidelines appearing when a control is being moved, and indicating the distance to other report elements (bands and controls).



For each report element, you can modify its default Snap Line spacing (paddings for bands and Panel, and margins for other controls) using the Property Grid.

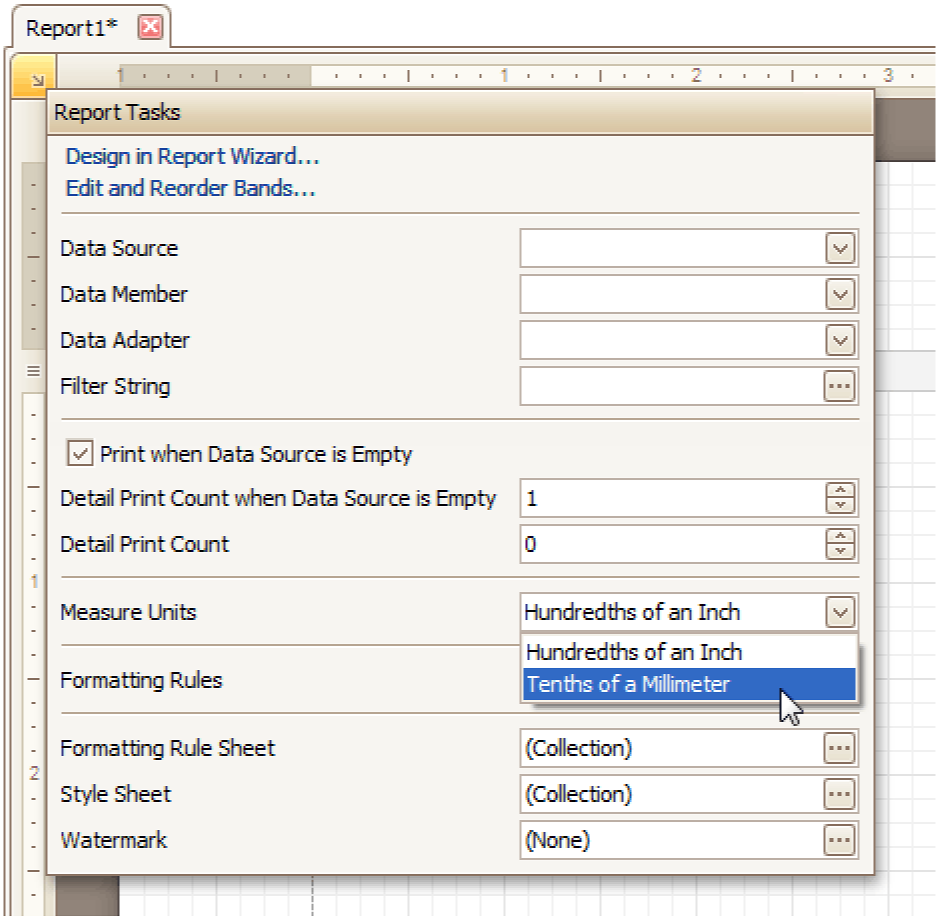




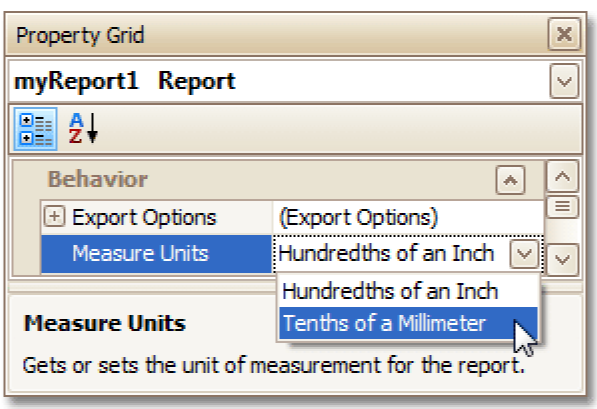
6.3.1.2 Change Measurement Units of a Report

For your report, you can choose its global **Measure Units**, which can be either **Hundredths of an Inch**, or **Tenths of a Millimeter**.

This can be specified either using the report's Smart Tag ...



... or via the Property Grid.



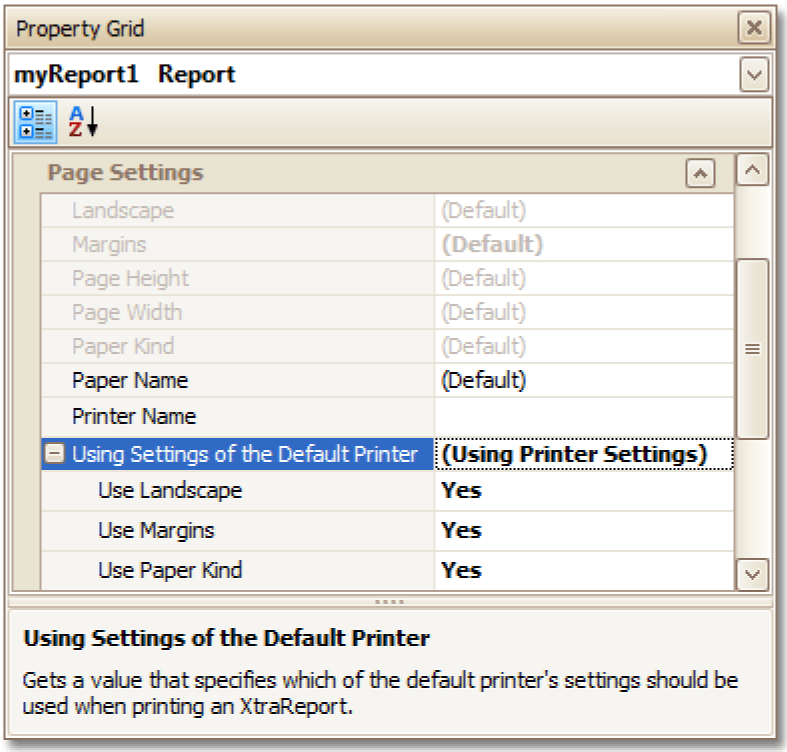
This defines the basic measurement unit for all the unit-related options of a report and its bands and controls (such as location, size, border width, etc.). And, this determines the measurement unit of the report's Snap Grid.

6.3.1.3 Change Page Settings of a Report

In the Report Designer, page settings of a report can be specified in one of two ways. The first approach forces the default printer settings to be used when the report is printed, while the other one enables you to alter page settings independently.

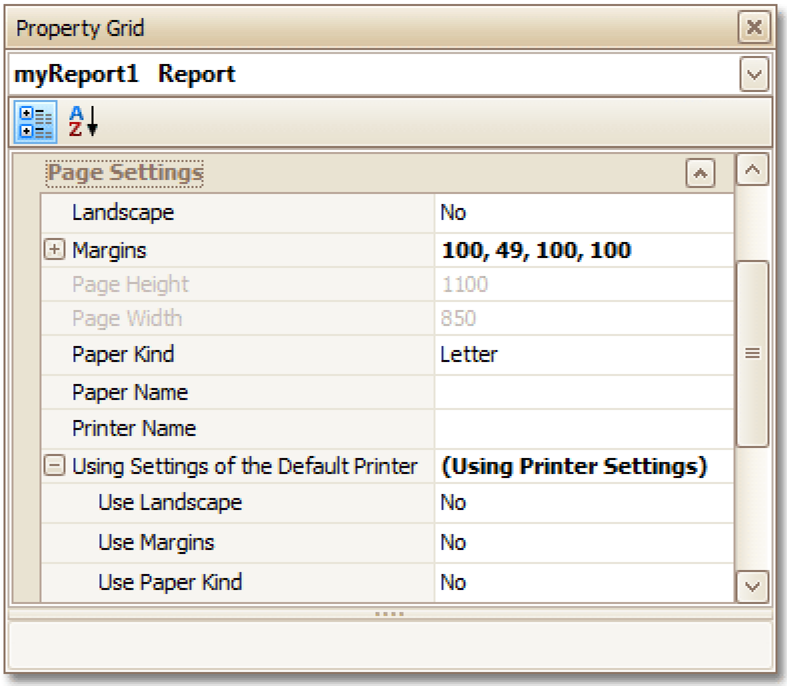
- **Using settings of the default printer**

For the orientation, margins and paper size, you can specify a requirement that applies the corresponding printer settings instead of the report's. In this instance, the page properties in the Property Grid are disabled and displayed as grayed out. This may be useful when the report is printed in several places with different printers and printer settings.



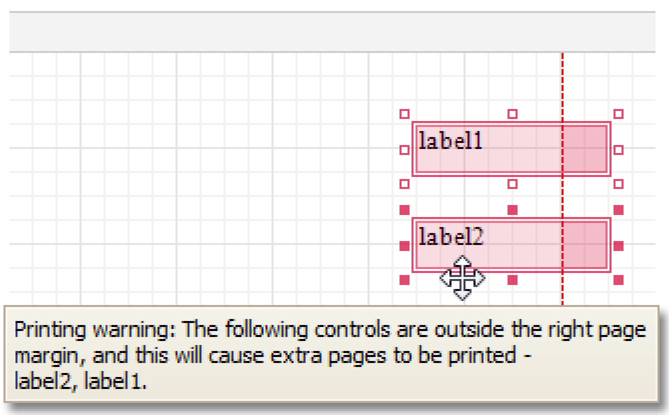
- **Specify the report's page settings**

While designing the report, you can specify the page settings via the Property Grid:



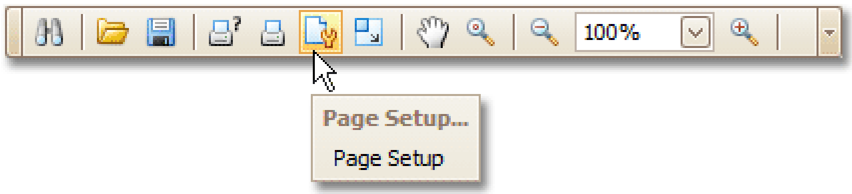
You can set the page orientation and modify the margins. The margin values are expressed in the report's measurement units. You can select from the predefined paper sizes (**Paper Kind** property), choose **Custom** and create your own paper size, or select one which is already defined for this printer (**Paper Name** property).

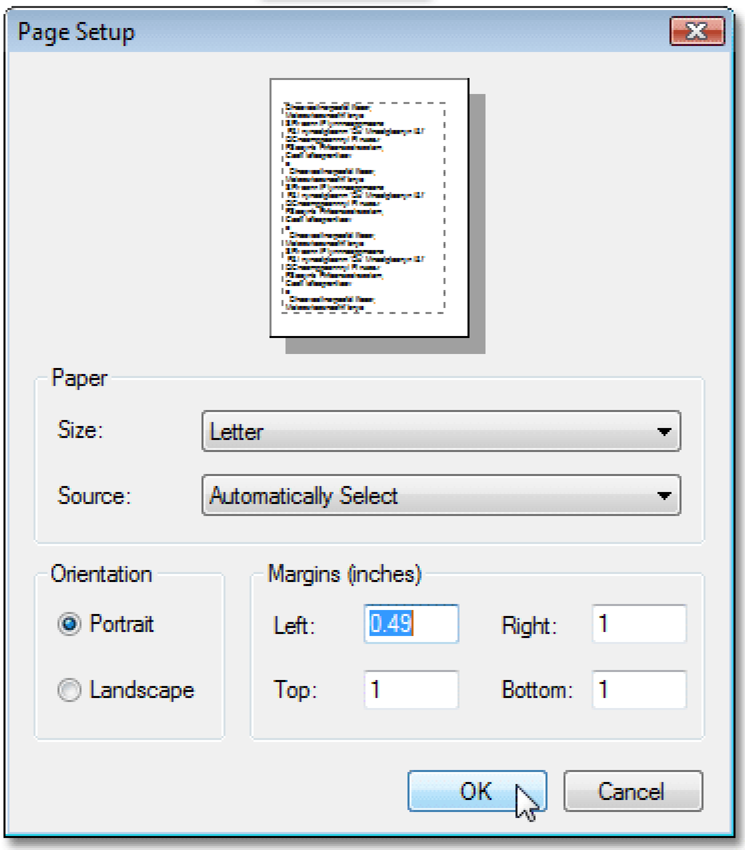
These settings affect the layout of the report's design surface. After their modification, you may notice red warning marks, indicating that the controls go beyond the page width. These warnings can be switched off by setting the **Show Printing Warnings** property of the report to **No**.



- **Modify the settings in Preview Tab**

The report's Preview Tab toolbar has a corresponding button that enables you to modify the page settings. Clicking this button invokes the **Page Setup** dialog, which allows you to adjust the page layout before printing or exporting, and select the printer.

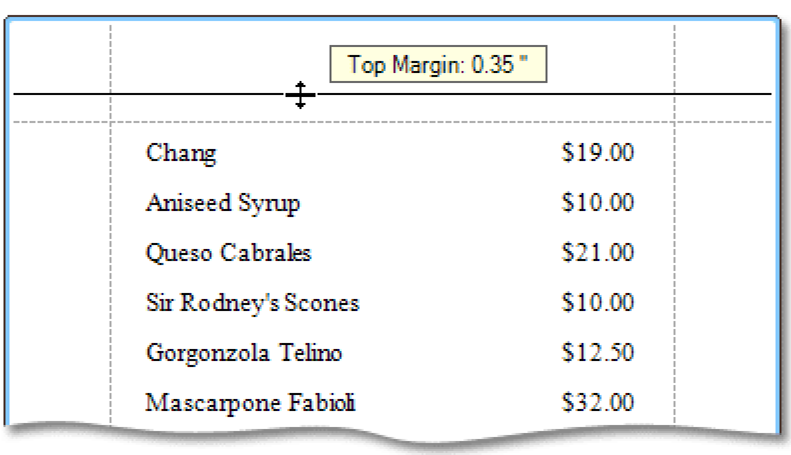




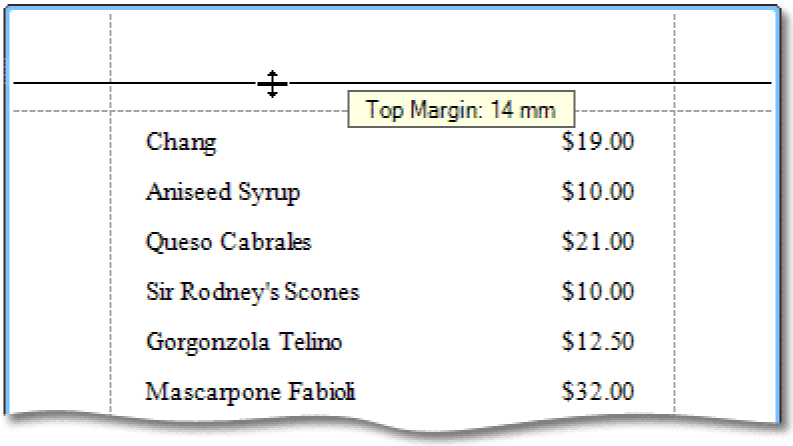
The margins can also be set visually by dragging the dashed lines in the Preview Tab as needed.

To change the measurement units shown in the margins tooltips, customize the report's **Measure Units** property.

Measure Units = Hundredths of an Inch



Measure Units = Tenths of a Millimeter



6.3.2 Report Types

The tutorials in this section provide you detailed instructions on how to create reports of different types with the Report Designer.

6.3.2.1 Table Report

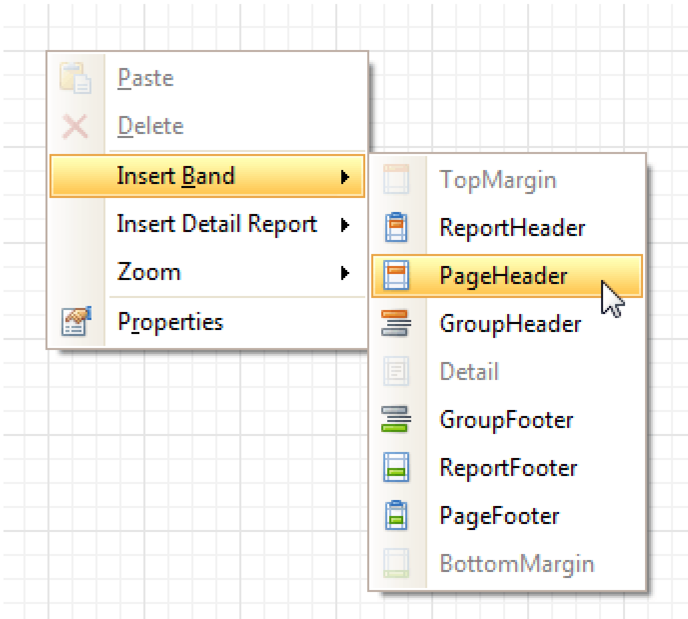
This tutorial describes the steps to create a table report, which means that the report's data is arranged into a table-like layout. This feature should not be confused with the master-detail report or cross-tab report.

To create a table report, follow the steps below.

1. Create a new report.

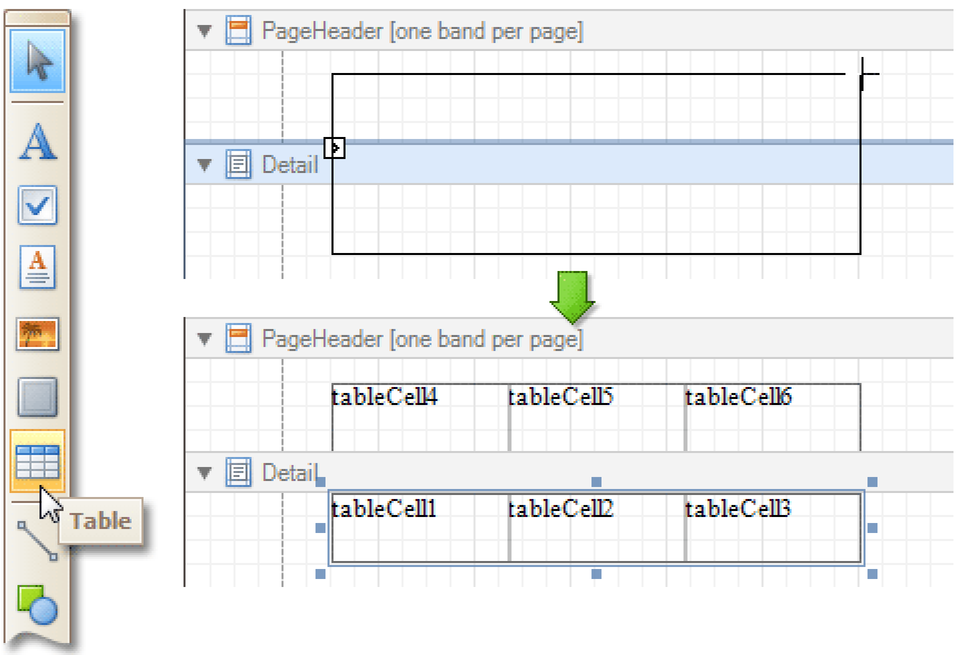
2. Bind the report to a data source.

3. To add a Page Header to the report, right-click anywhere on the report's surface, and in the invoked Context Menu, choose **Insert Band | Page Header**.



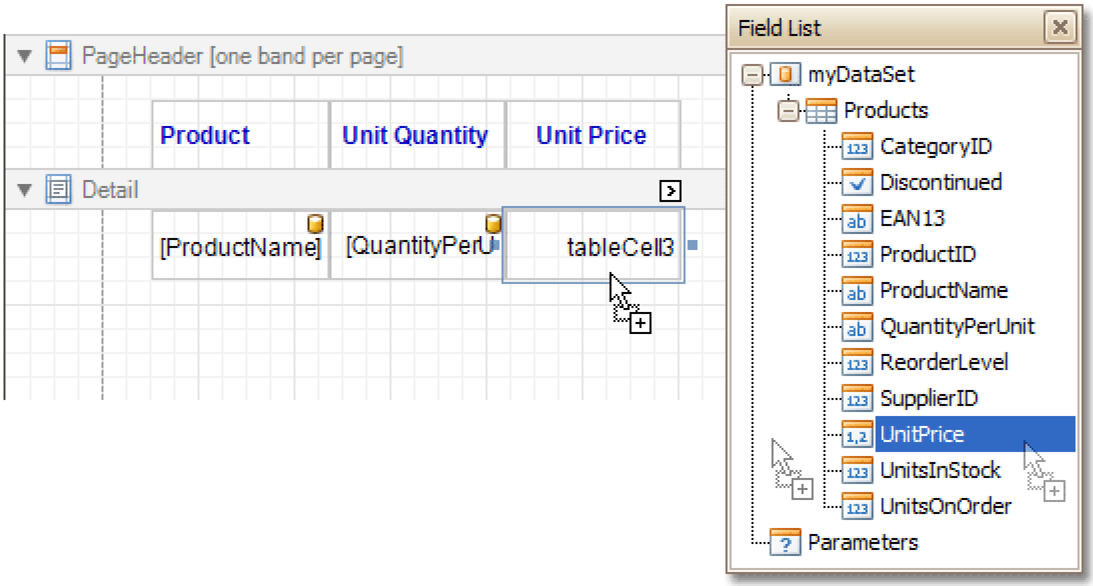
4. Now, add two Table controls to the report's Page Header and Detail band.

To do this, in the Toolbox, click the Table icon. Then, in the Page Header's content area, click and hold down the left mouse button while dragging the mouse cursor across the Detail band.



As a result, two tables are created. One will be used as a header, and the other one - for the report's detail information.

5. Type the headers into the upper table's cells, and bind the corresponding cells in the detail section to the appropriate data fields. This can be done by simply dropping these fields from the Field List onto the cells.



6. Finally, you can customize various properties of the tables, to improve their appearance. For example, using the Property Grid you can define their Borders, as well as Background Color. To customize the cells' text options, use the Formatting Toolbar.

A noteworthy feature is the capability to specify odd-even styles for the detail table.

6.3.2.2 Label Report

This tutorial describes the steps to create a label report containing employee badges, using the Report Wizard.

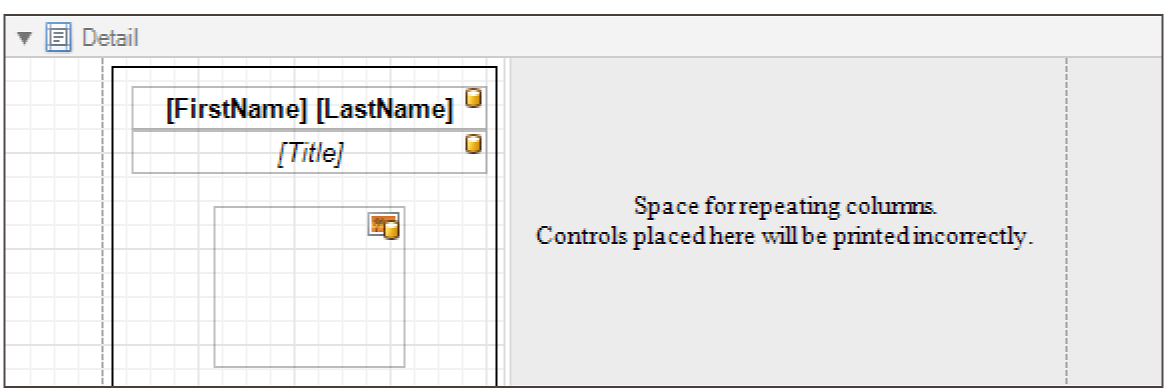
To create a label report, do the following:

1. In the Main Menu, select File and click New with Wizard... (or press CTRL+W).

2. Next, the Wizard will guide you through the process of creating a label report. For detailed instructions on the wizard's steps, refer to Label Report Wizard.

3. Bind the report to a data source containing information about employees.

4. Finally, drop the required fields from the Field List onto the available Detail band's area, and customize their layout.



Note that you can employ the mail merge, to combine multiple data fields within the same control.

6.3.2.3 Master-Detail Report (Detail Report Bands)

This tutorial describes the steps to create a master-detail report (or, invoice report) with hierarchically linked data, using the Detail Report band.

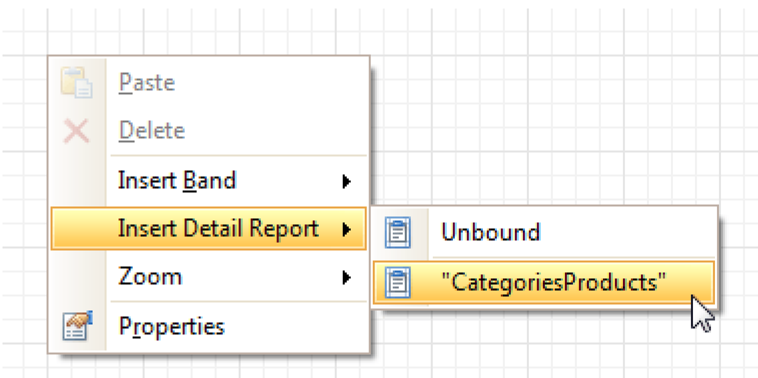
Design a Master-Detail Report

To create the layout of a master-detail report, do the following:

1. Allocate parts of a master report on the report's Detail Band.

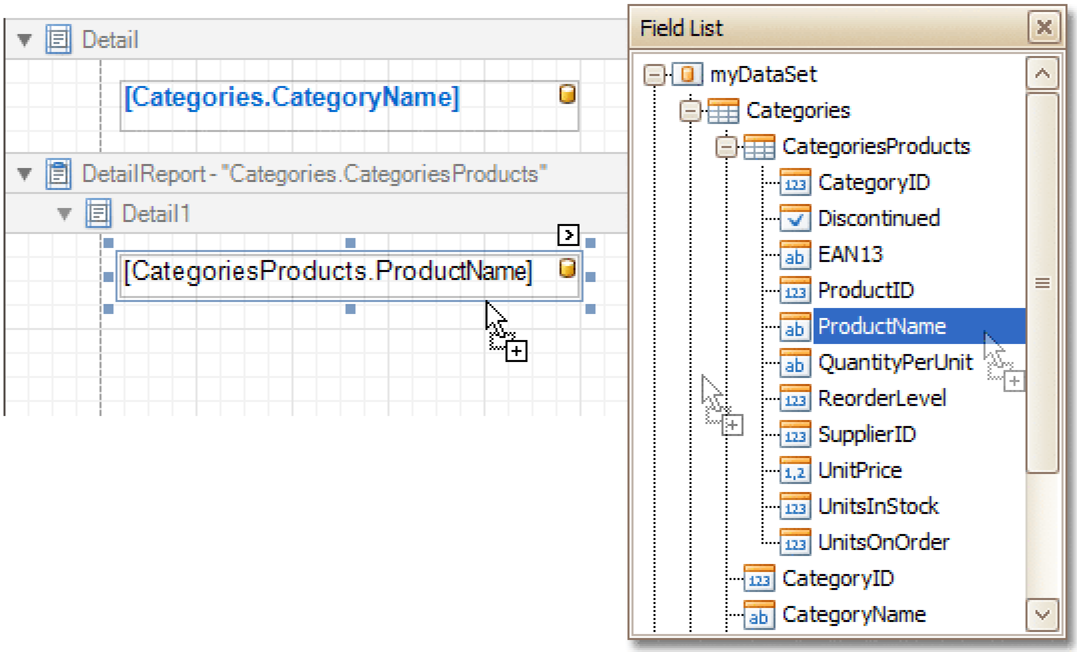
For the master report to be generated properly, the report's Data Member should be set to the master query. If you added the master query first, this property is set to the required value automatically. To manually specify the data member, click the report's smart tag and in the invoked actions list, expand the drop-down list for the Data Member property and select the master query.

2. Now, to add a detail report band, right-click anywhere on the report's surface, and in the invoked Context Menu, point to Insert Detail Report. When the report's data source contains a data relationship, it is displayed in the Context Menu.



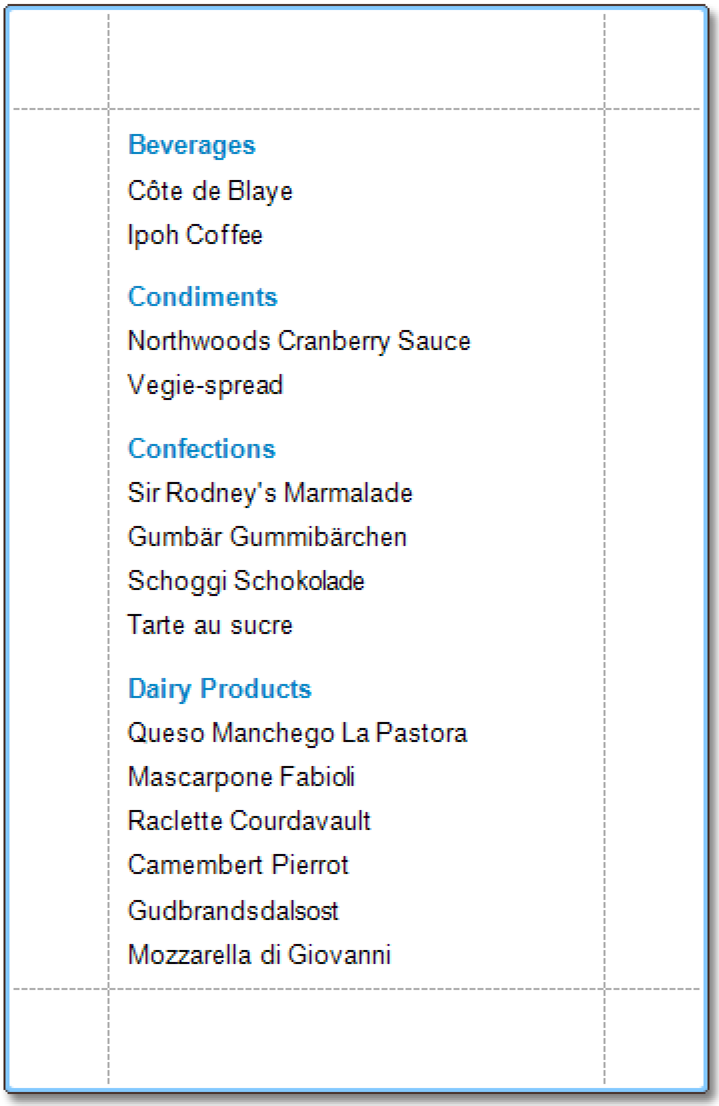
3. Then, drop the required data fields from the Field List onto the detail report band.

Note that you should drop items from the relation node (in this example it is the CategoriesProducts section), for the detail report to be generated correctly.



View the Result

The master-detail report is now ready. Switch to the Preview Tab, and view the result.



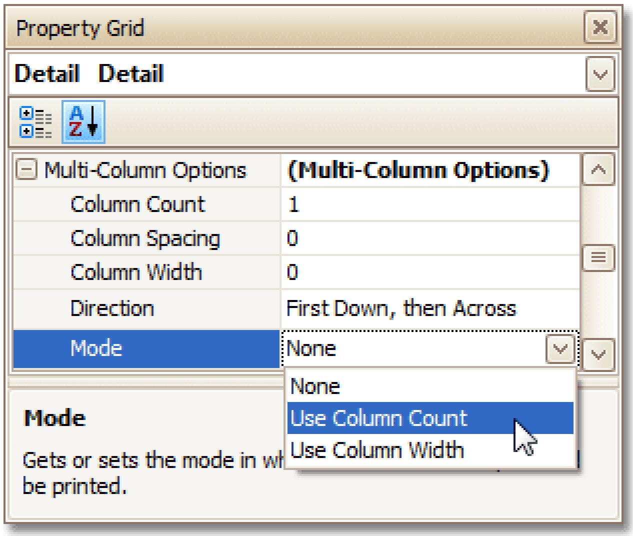
6.3.2.4 Multi-Column Report

This tutorial describes the steps to create a multi-column report, meaning that each page of the report document is laid out in a specified number of columns.

To demonstrate the multi-column feature, we'll use a report with grouping.

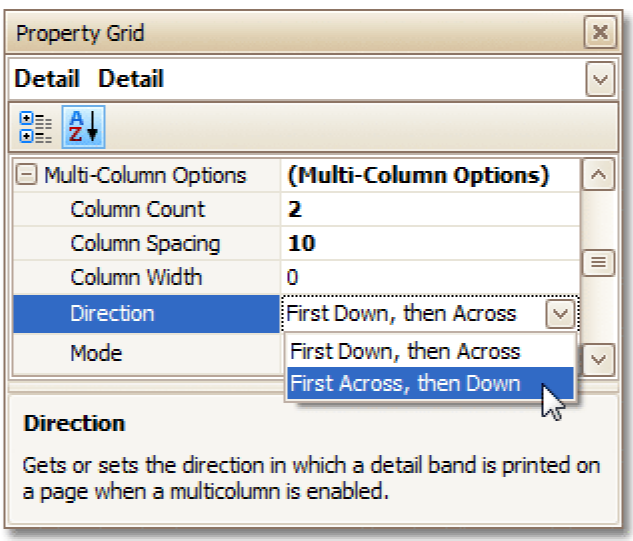
1. Select the Detail band, and in the Property Grid, expand the Multi-Column Options section.

First, set the required Mode. It determines whether the number of columns is manually specified, or it depends on the fixed column width.

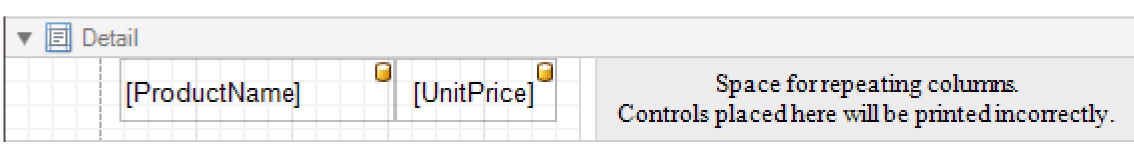


2. Then, if you've chosen to **Use Column Count**, set the **Column Count** to **2**, and **Column Spacing** to **10**.

The Direction determines the order in which records of the same group are processed.



3. Now, on the Detail band's surface a grey area appears, delimiting the available column's width. Adjust the controls width, so that they fit within the effective borders.



The multi-column report is now ready. Switch to the Preview Tab, and view the result.

Category: 1			
Chai	$18.00	Chang	$19.00
Sasquatch Ale	$14.00	Steeleye Stout	$18.00
Côte de Blaye	$263.50	Chartreuse verte	$18.00
Ipoh Coffee	$46.00	Laughing Lumberjack Lager	$14.00
Outback Lager	$15.00	Lakkalikööri	$18.00
Category: 2			
Aniseed Syrup	$10.00	Chef Anton's Cajun Seasoning	$22.00
Chef Anton's Gumbo Mix	$21.35	Northwoods Cranberry Sauce	$40.00
Genen Shouyu	$15.50	Gula Malacca	$19.45
Sirop d'érable	$28.50	Vegie-spread	$43.90
Category: 3			
Pavlova	$17.45	Sir Rodney's Marmalade	$81.00
Sir Rodney's Scones	$10.00	NuNuCa Nuß-Nougat-Creme	$14.00
Gumbär Gummibärchen	$31.23	Schoggi Schokolade	$43.90
Chocolade	$12.75	Maxilaku	$20.00
Valkoinen suklaa	$16.25	Tarte au sucre	$49.30
Scottish Longbreads	$12.50		

6.3.3 Navigation

The tutorials of this section cover the navigation-related features of the Report Designer.

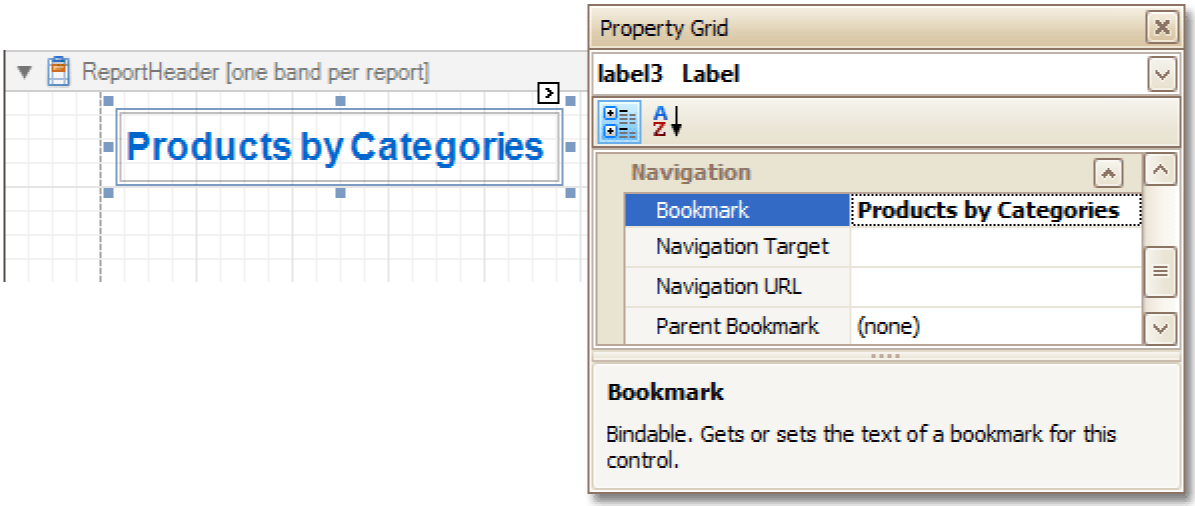
6.3.3.1 Add Bookmarks

This tutorial describes the steps to create a report with bookmarks (a so-called Document Map). This feature allows you to easily navigate through the report during print preview.

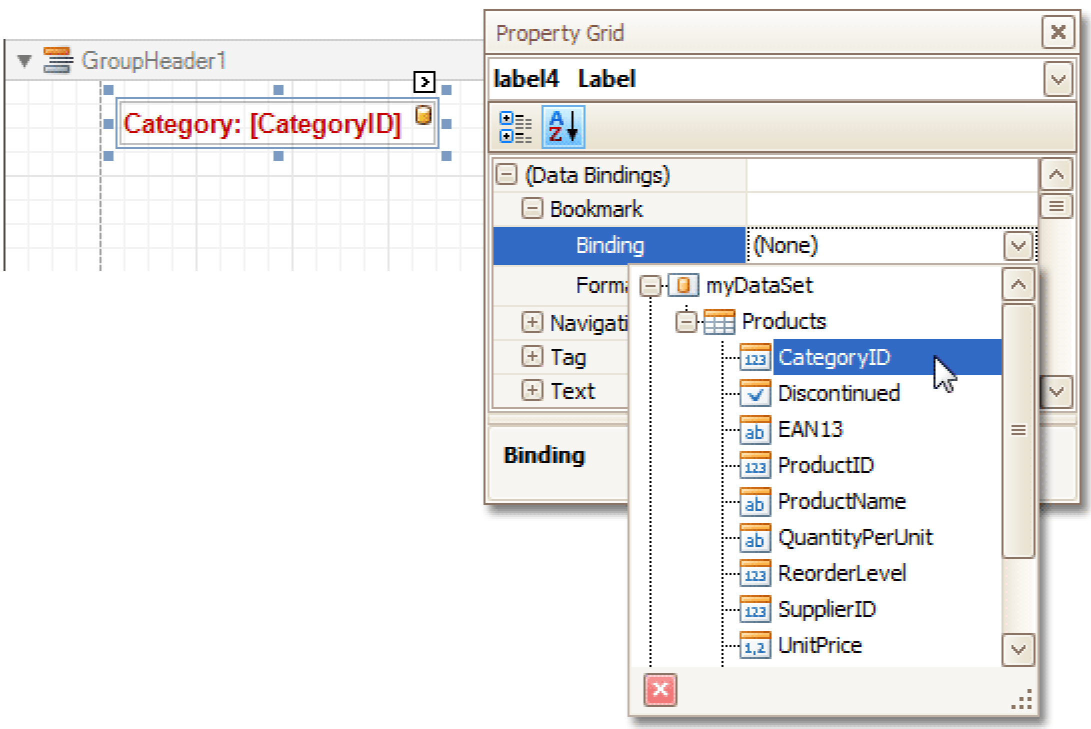
To demonstrate the Document Map feature, we'll use a report with grouping.

To create a report with bookmarks, do the following:

1. Click the Label in the Report Header band, to select it, and in the Property Grid, set its Bookmark property to the same value as its text (i.e. Products by Categories).

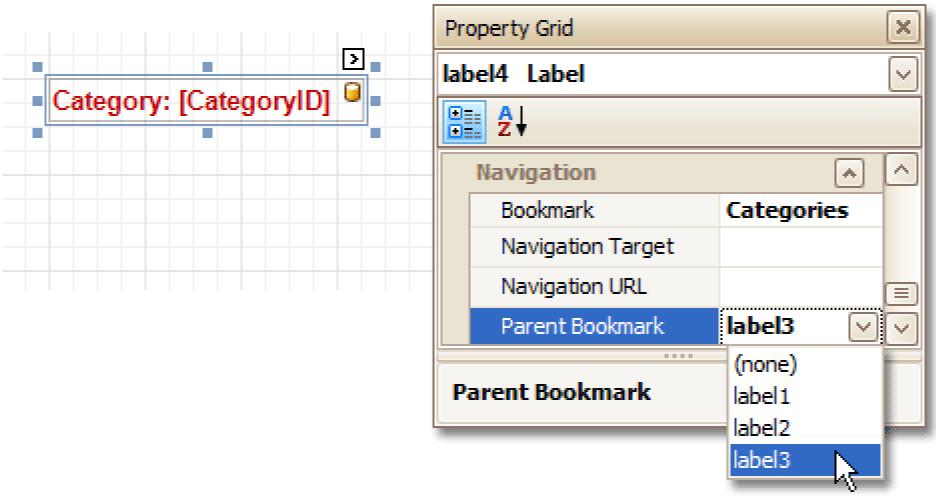


2. Now, select the Label in the report's Group Header band. As this control is bound to data, we will bind its **Bookmark** property to the same data field, using the (**Data Bindings**) property.

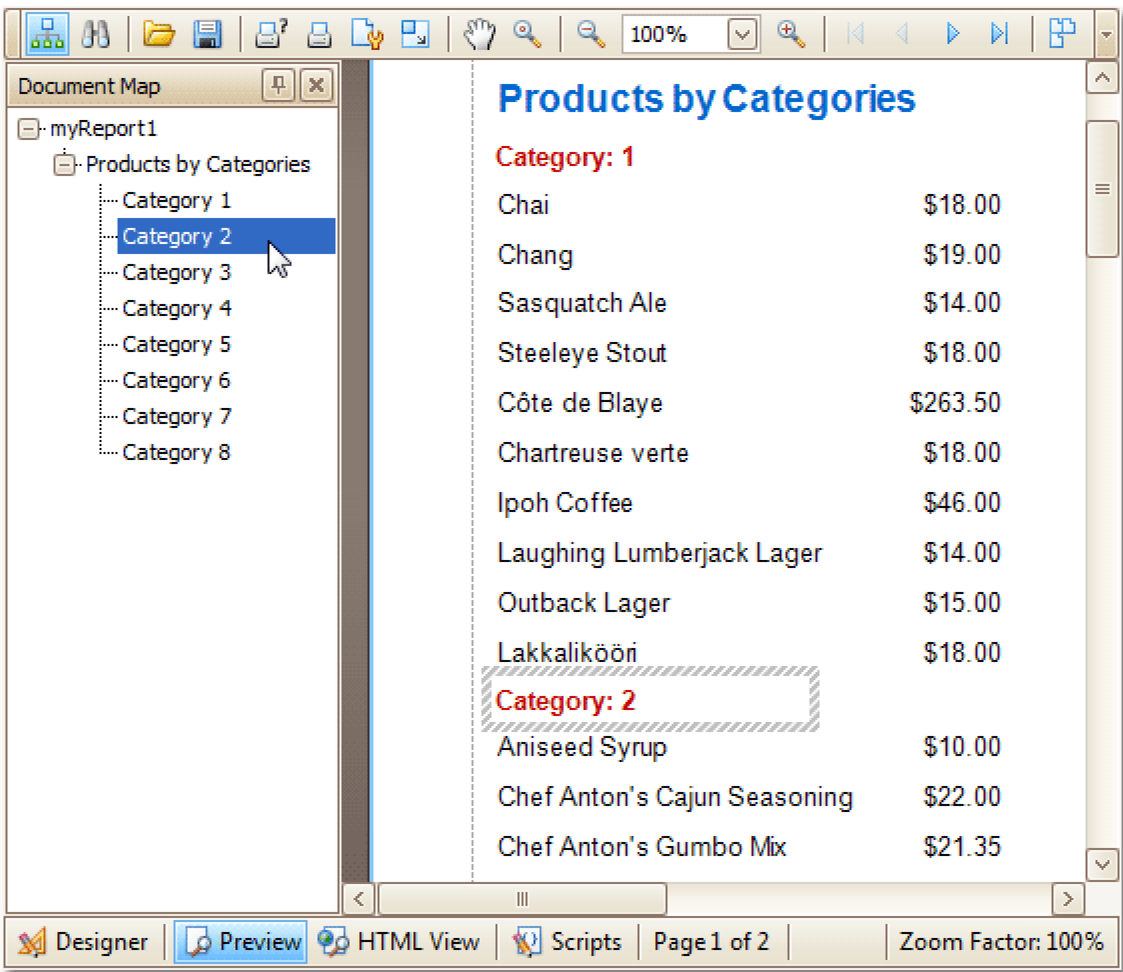


Note that as with other bindable properties, you also can apply value formatting to the **Bookmark** property (e.g. **Category {0}**).

3. Then, for this Label, specify its **Bookmark**, and set the **Parent Bookmark** property to the Report



The report with bookmarks is now ready. Switch to the Preview Tab, and view the result.



6.3.3.2 Create Hyperlinks

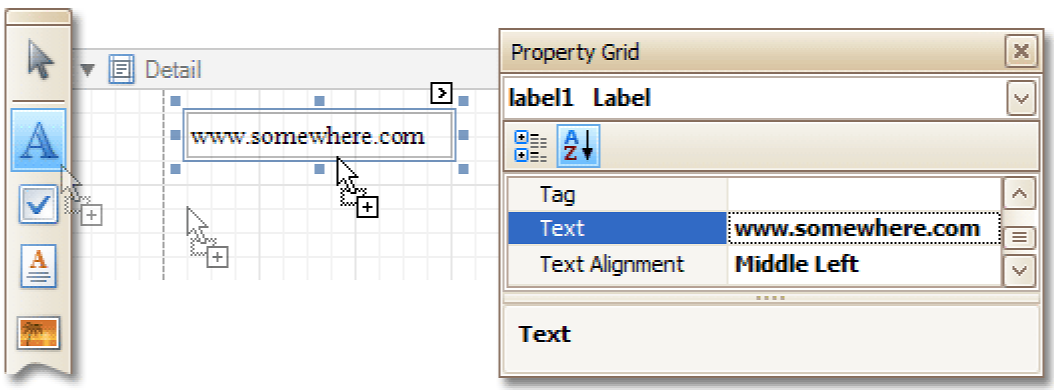
This tutorial demonstrates how to embed a hyperlink into your report.

Note that a label will behave as a hyperlink both in a report's Print preview, HTML preview and when the report is exported to PDF, HTML, MHT, RTF, XLS and XLSX formats.

To insert a hyperlink into your report, do the following:

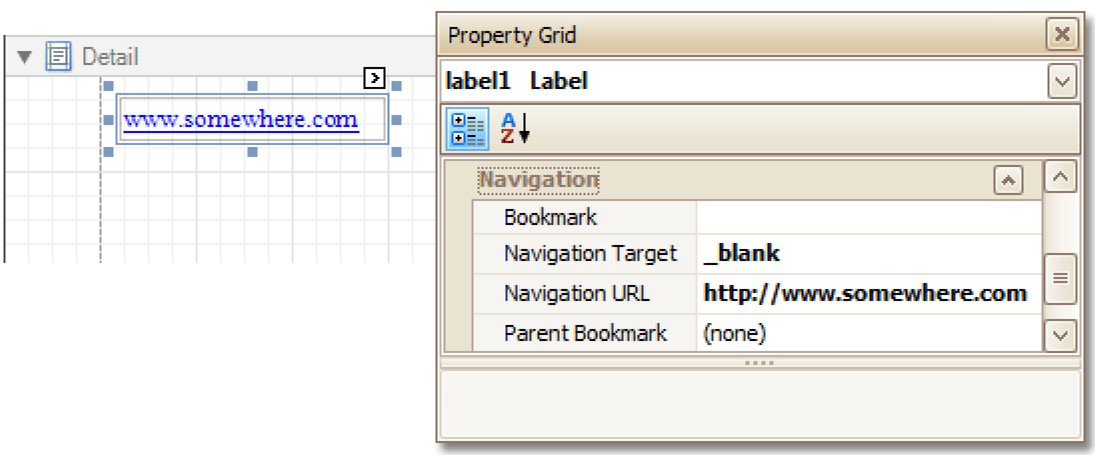
1. Create a new report or open an existing report.

2. Drop a Label onto the report, and in the Property Grid, change its Text to the one required for the link.

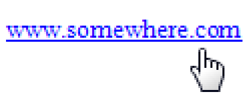


In addition, to make the Label look like a typical link, you can change its appearance appropriately (e.g. make it blue and underlined).

3. Now, set its **Navigation Target** to the required value (_blank, _parent, _s earch, _s elf, or _top), and define the required **Navigation URL**.



The hyperlink is now ready. Switch to the Preview Tab (or, HTML View Tab), and view the result.



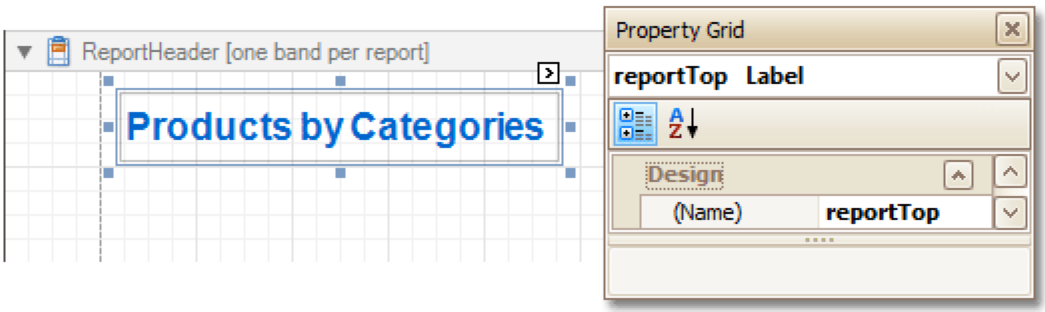
6.3.3.3 Add a Cross-Reference

This tutorial demonstrates how to add a cross-reference to your report. A cross-reference is simply a link whose target is located within the current document, which allows you to establish easy navigation through a report. In this example, we place a link at the bottom of each group, leading to the beginning of the report.

To demonstrate this feature, we'll use a report with grouping.

To create a report with cross-references, do the following:

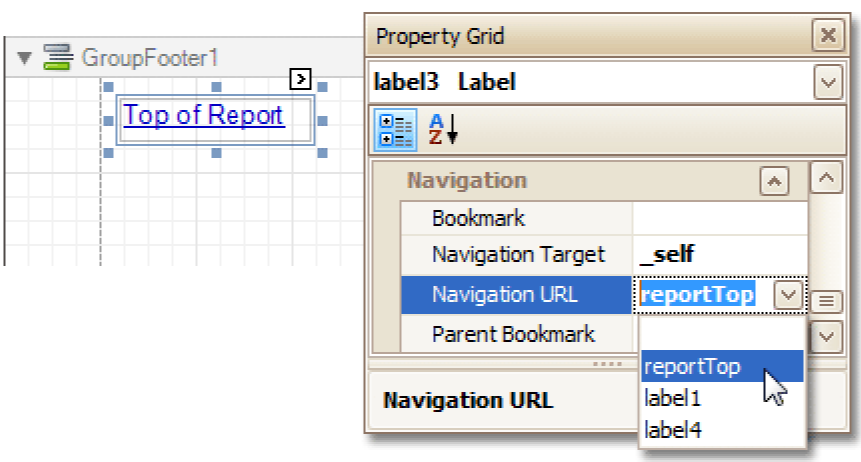
1. Drop a label onto the created **ReportHeader** band, which will serve as the report's headline. Click the label, to type the desired contents into it. Then, in the Property Grid, set its **Name** property to **reportTop**.



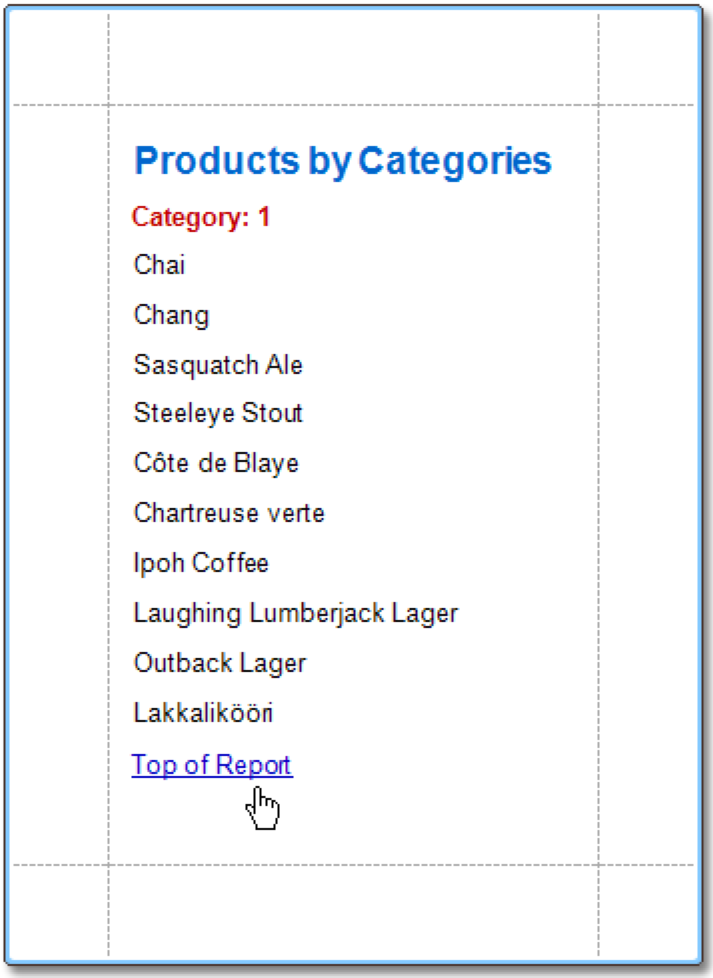
2. To accompany the existing Group Header with the corresponding Footer, in the Group and Sort Panel, check the **Show Footer** option.

Then, drop a label onto it. As it will be the link, change its **Text** to **Top of Report**, and apply the desired formatting to it (e.g. the blue color and underlined text).

Set its **Navigation Target** property to **_self**. Then, if you click the drop-down list of the **Navigation URL** property, you can see the controls available in your report. Choose the one named **reportTop**.



The report with cross-references is now ready. Switch to the Preview Tab (or, HTML View Tab), and view the result.



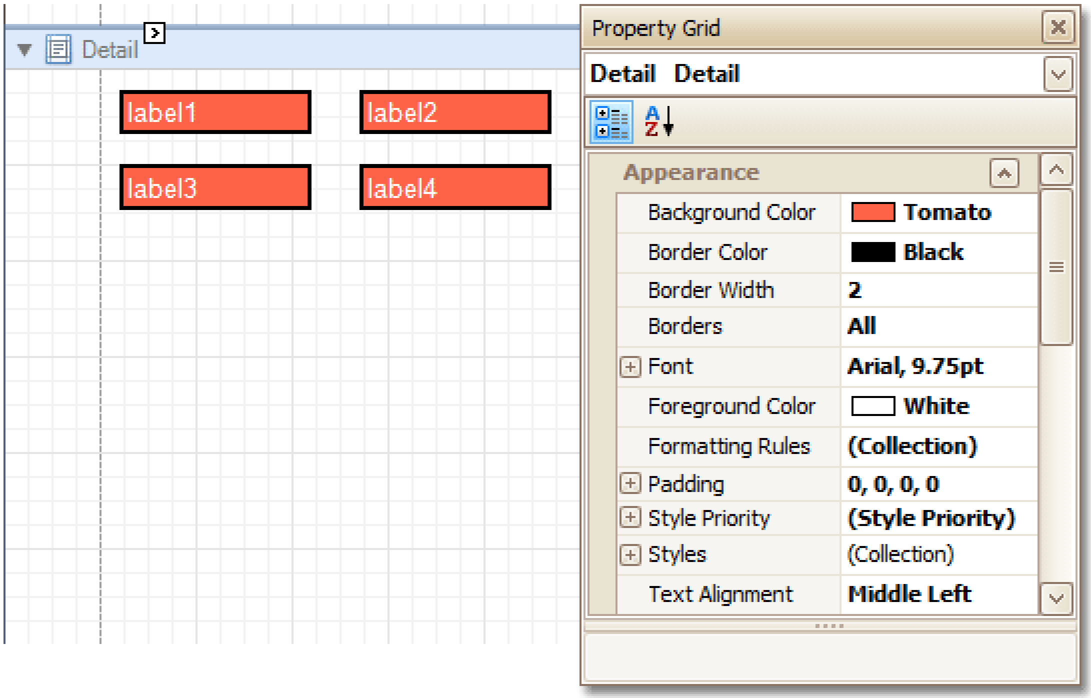
6.3.4 Styles and Conditional Formatting

The topics of this section cover appearance-related information about the Report Designer.

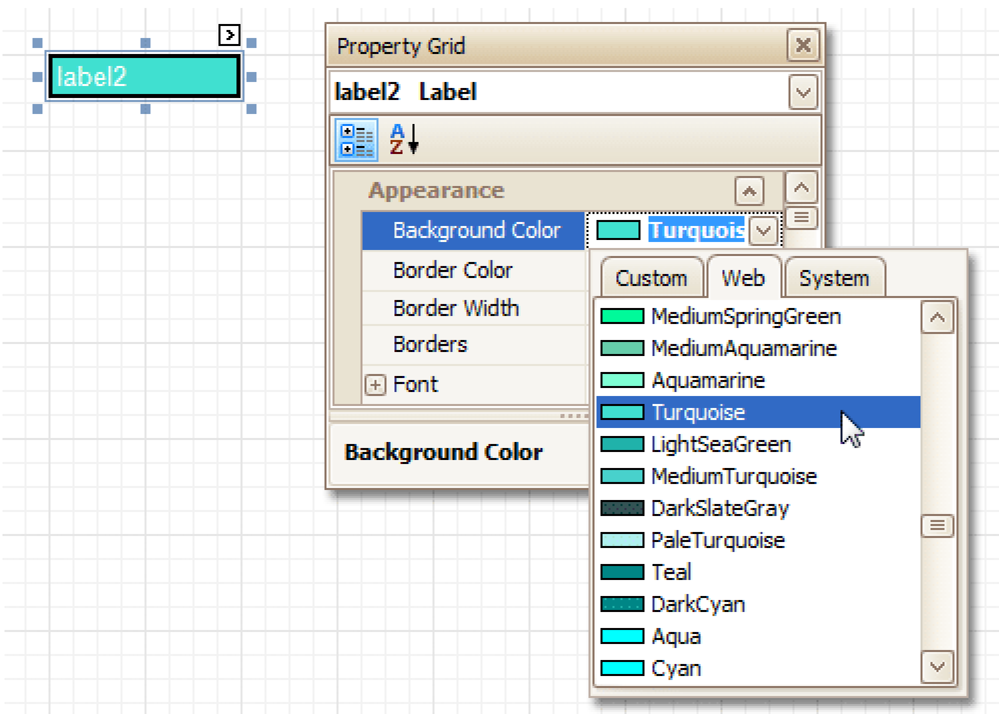
6.3.4.1 Understanding Style Concepts

The Appearance Properties

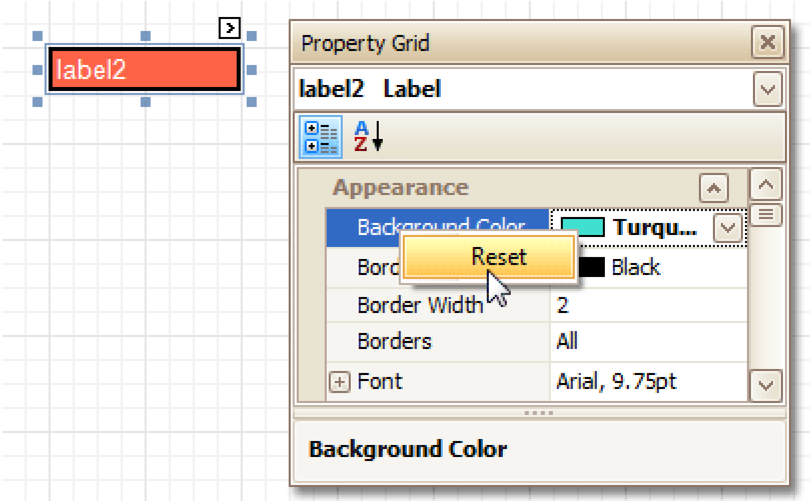
In the Report Designer, a report and each of its elements (bands and controls) has a complete set of appearance options (such as **Background Color, Borders, Font, Foreground Color, Text Alignment**, etc.). By default, these properties aren't specified, meaning that their real values are obtained from a control's (or band's) parent, which is the report itself. So, the appearance, specified for a report, is distributed to all its child elements. Similarly, the appearance of a band is translated to the controls it contains.



In turn, a control's appearance can be adjusted independently from its parent.



When it is required to reset a value assigned to a control's appearance property, you can right-click this property in the Property Grid, and in the invoked menu, click Reset. So, the control will be restored to the appearance of its parent.



Styles Priority and Inheritance

To differentiate appearance settings in your report, you can create comprehensive styles (which are stored in the report's style sheet), and then can be assigned to individual elements. There are two ways to store a report's styles.

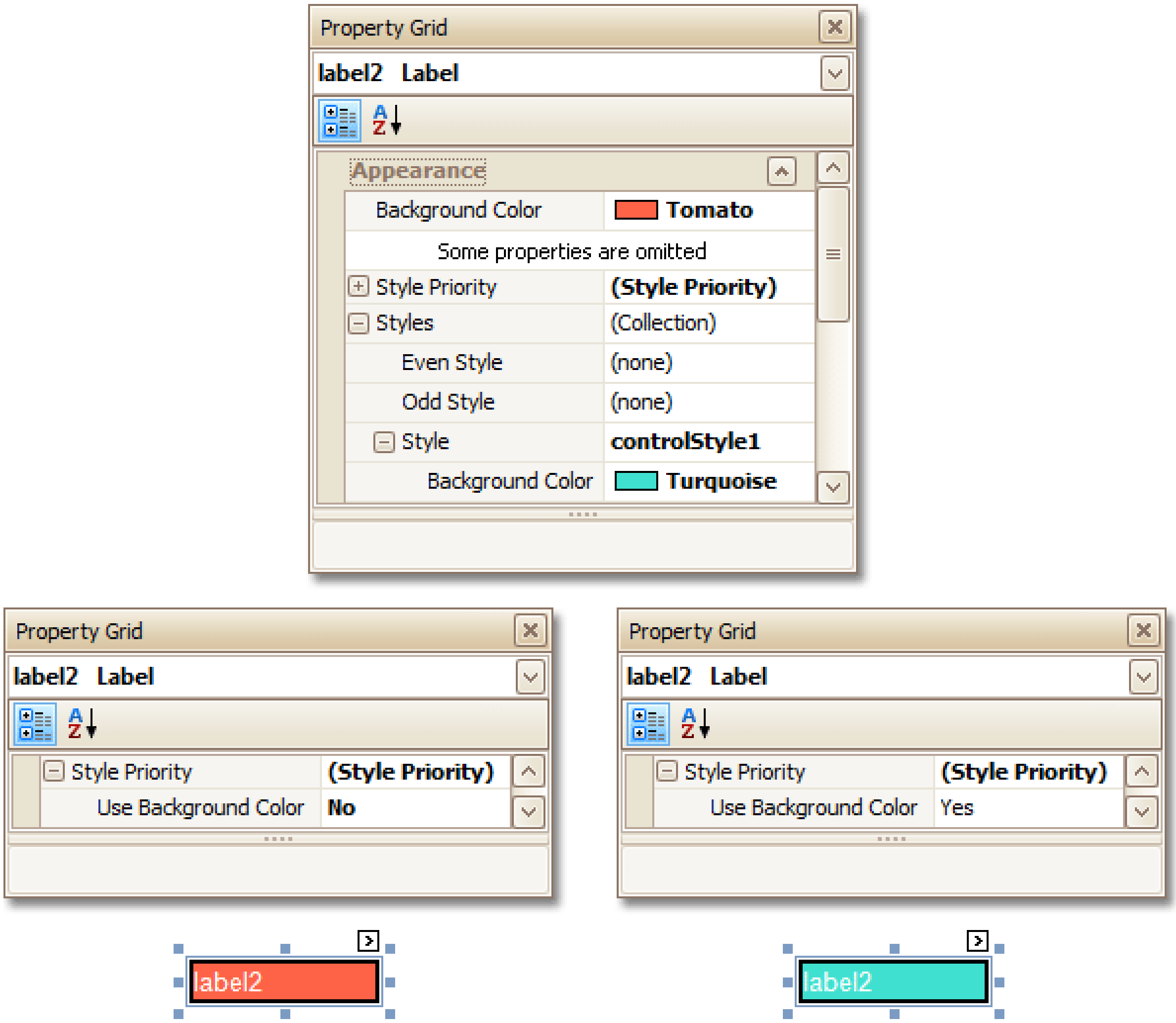
- to save them to external files (with REPSS extension), and then load them to a report via its **Style Sheet Path** property;
- to store the styles within the report, so that they can be easily accessed via its Style Sheet property.

Note that if styles contained in a style sheet loaded via the Style Sheet Path property have the same names as styles already contained in a report, the latter ones are overridden.

When both styles and individual appearance settings are assigned to an element, you can control the priority of their differing options, via an element's **Style Priority** property.

By default, most of the **Style Priority's** options (**Use Background Color, Use Border Color**, etc.) are set to **Yes**.

This means that if any style is assigned to a control, its properties will have a higher priority than the appearance properties of this element or its parent. You can assign a higher priority to an element's appearance property, by disabling the corresponding Use* property.



The same principles are applied to the odd-even s tyles feature, which allows you to alternate the appearance of consecutive data rows in your report. For details on this, refer to Use Odd and Even Styles.

NOTE When conditional formatting is applied to an element, its appearance definition has the highest priority.

6.3.4.2 Use Odd and Even Styles

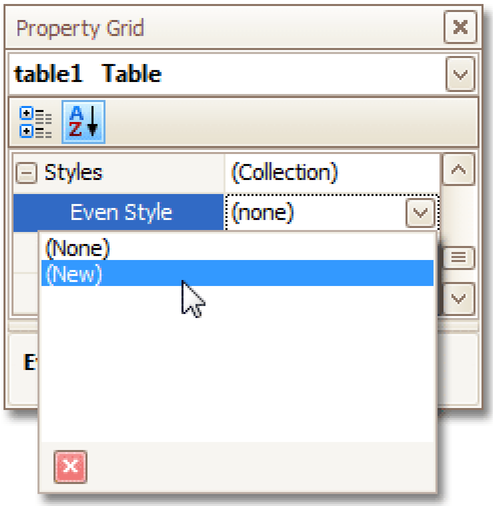
This tutorial describes how to apply odd and even s tyles to report controls, e.g. to alternate the background color for each record.

To utilize odd and even styles, do the following:

1. Create a table report.

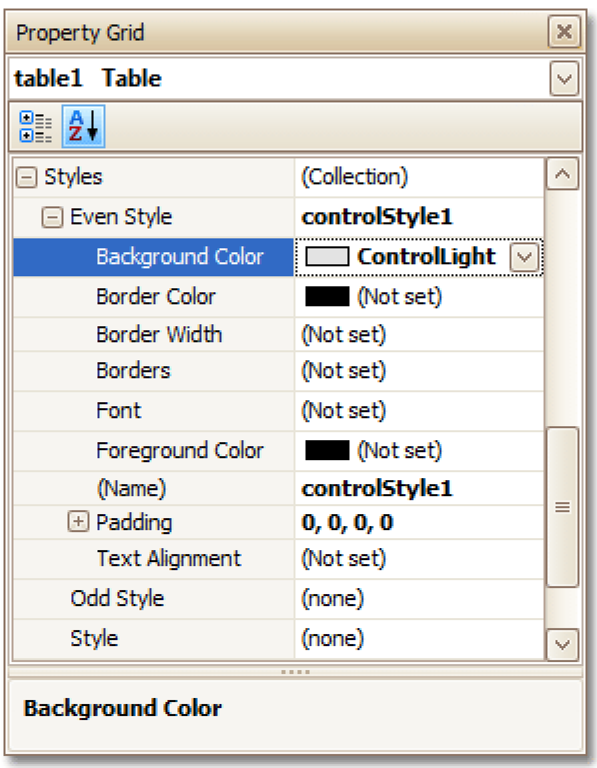
2. Select the detail table, and in the Property Grid, expand its **Styles**.

Invoke the drop-down list for the **Even Style**, and click (**New**).



This will create a style and assign it to the control's Even Style.

3. Now, expand the Even Style property, and adjust the required options, e.g. set the Background Color to ControlLight.



If required, perform the same steps, to create and assign an odd style, as well.

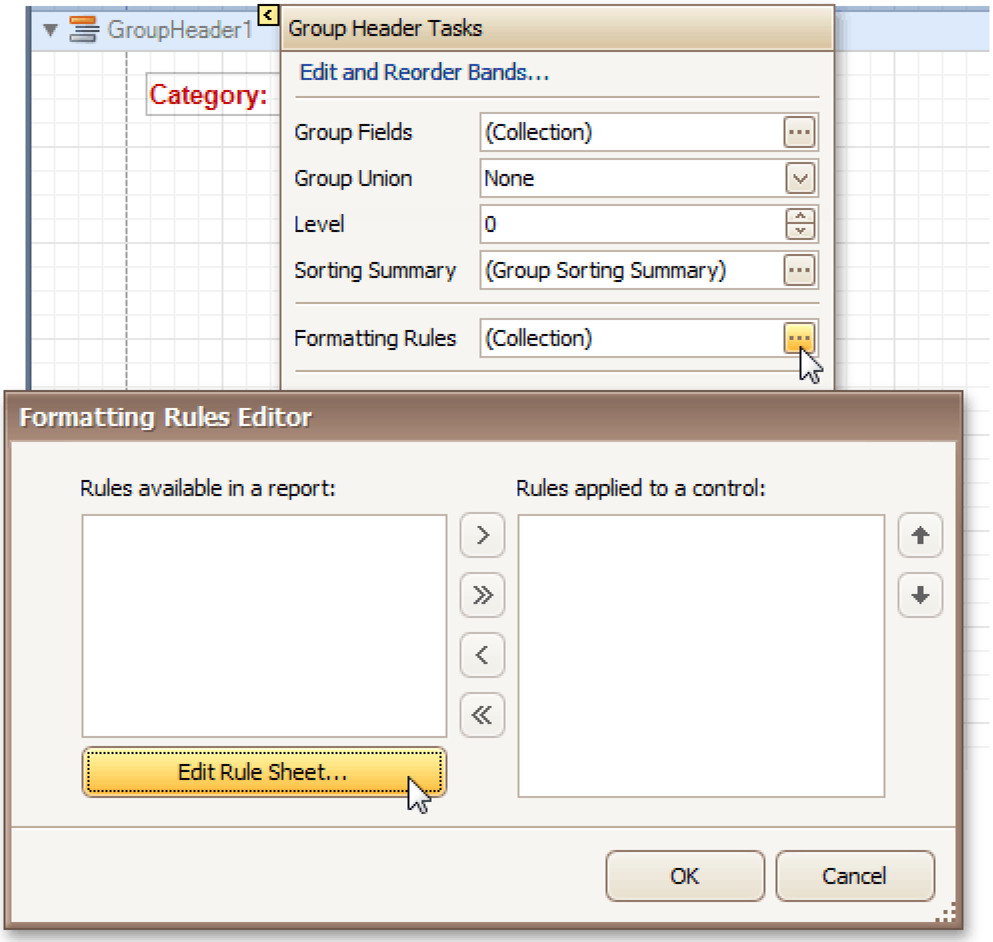
Product	Unit Quantity	Unit Price
Chai	10 boxes x 20 bags	$18.00
Chang	24 - 12 oz bottles	$19.00
Aniseed Syrup	12 - 550 ml bottles	$10.00
Chef Anton's Cajun Seasoning	48 - 6 oz jars	$22.00
Chef Anton's Gumbo Mix	36 boxes	$21.35
Grandma's Boysenberry Spread	12 - 8 oz jars	$25.00
Uncle Bob's Organic Dried Pears	12 - 1 lb pkgs.	$30.00
Northwoods Cranberry Sauce	12 - 12 oz jars	$40.00
Mishi Kobe Niku	18 - 500 g pkgs.	$97.00
Ikura	12 - 200 ml jars	$31.00
Queso Cabrales	1 kg pkg.	$21.00
Queso Manchego La Pastora	10 - 500 g pkgs.	$38.00
Konbu	2 kg box	$6.00
Tofu	40 - 100 g pkgs.	$23.25

6.3.4.3 Conditionally Hide Bands

To demonstrate this feature, we'll use a report with grouping.

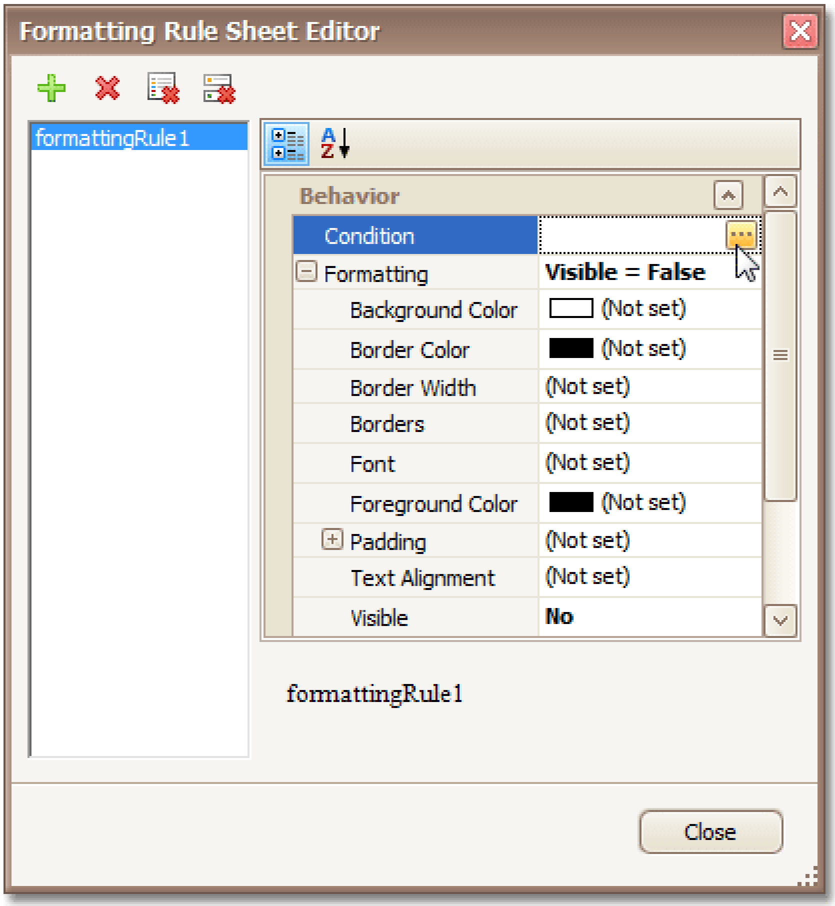
To conditionally hide bands in a report, do the following:

1. Select the Group Header, and click its Smart Tag. Then, in the invoked actions list, click the ellipsis button for the **Formatting Rules** option.

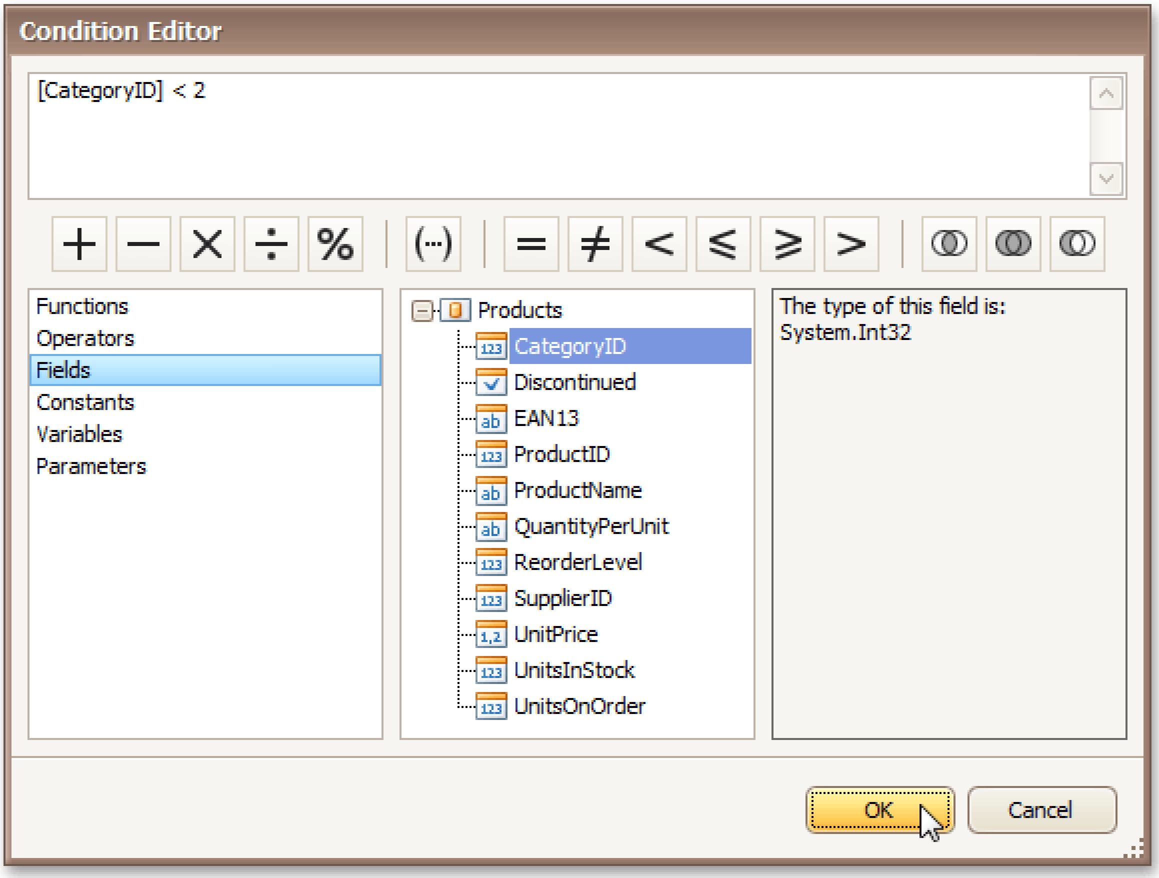


In the invoked Formatting Rules Editor, click the Edit Rule Sheet... button.

2. Now, in the invoked Formatting Rule Sheet Editor, click the button, to create a new rule. Then, set its Visible property to No, and click the ellipsis button for the Condition property.

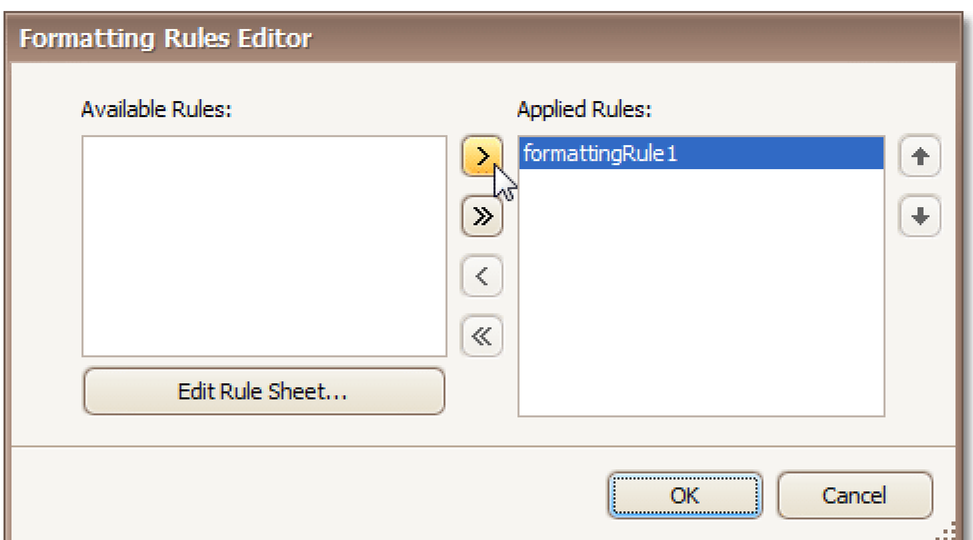


3. Construct the required logical expression (e.g. **[CategoryID] < 2**), and click **OK**.



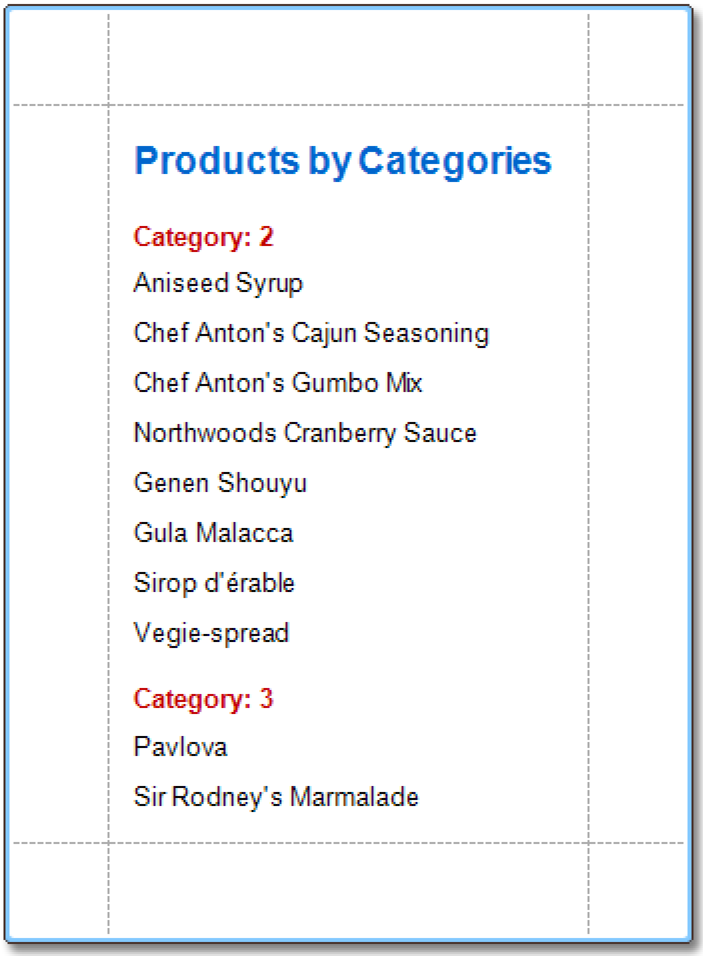
To quit the **Formatting Rule Sheet Editor**, click **Close**.

4. Back in the **Formatting Rules Editor**, move the created rule to the dialog's right section (**Applied Rules**), to make it active.



And, do the same for the report's Detail band. That is, click the ellipsis button for its Formatting Rules property, and in the invoked dialog, apply the same rule to this band, as well.

Switch to the Preview Tab, and view the result. In our example, you can see that the first category isn't shown. So, the conditional formatting was applied properly.



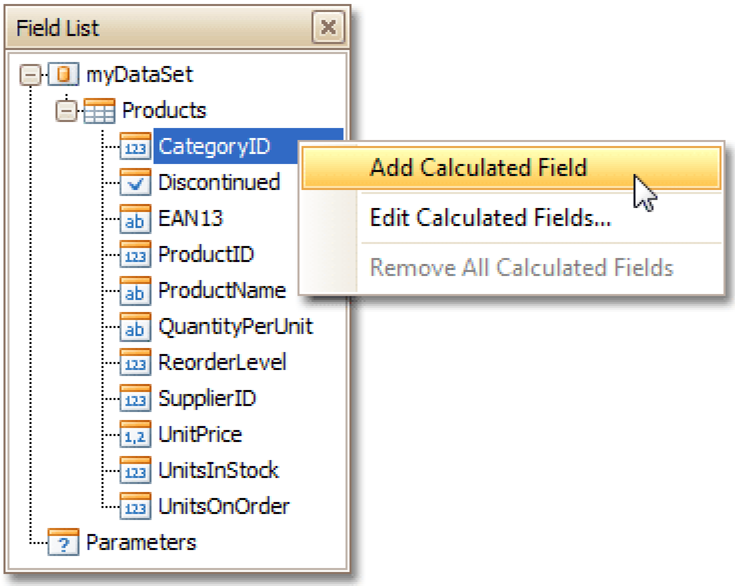
6.3.4.4 Conditionally Change a Label's Text

This tutorial demonstrates how to change a label's text if a certain condition is met, without using scripts.

To conditionally change a label's text, do the following:

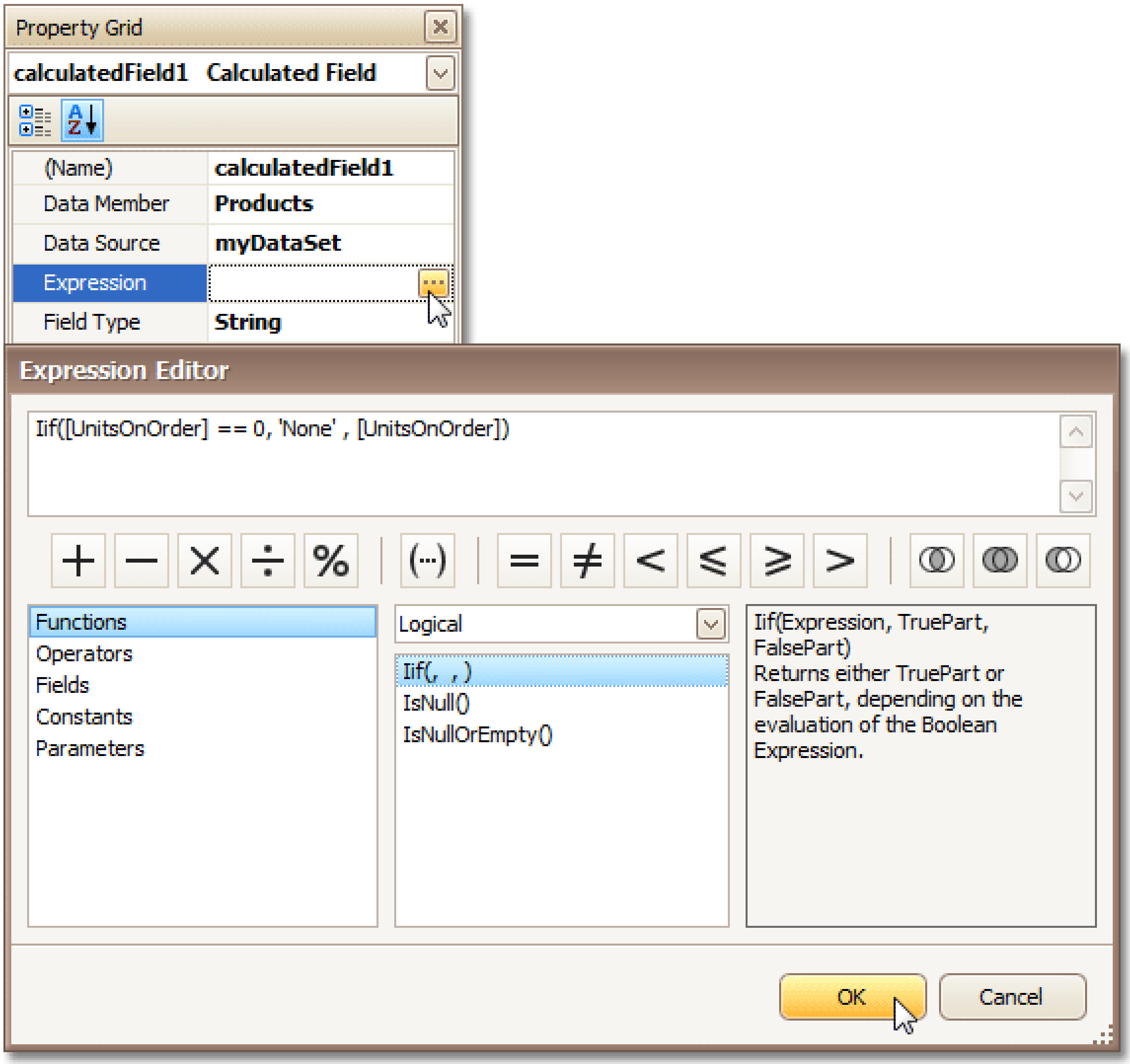
1. Create a new report or open an existing one.

2. To create a calculated field, in the Field List, right-click any item inside the created dataset, and on the invoked menu, choose **Add Calculated Field**.



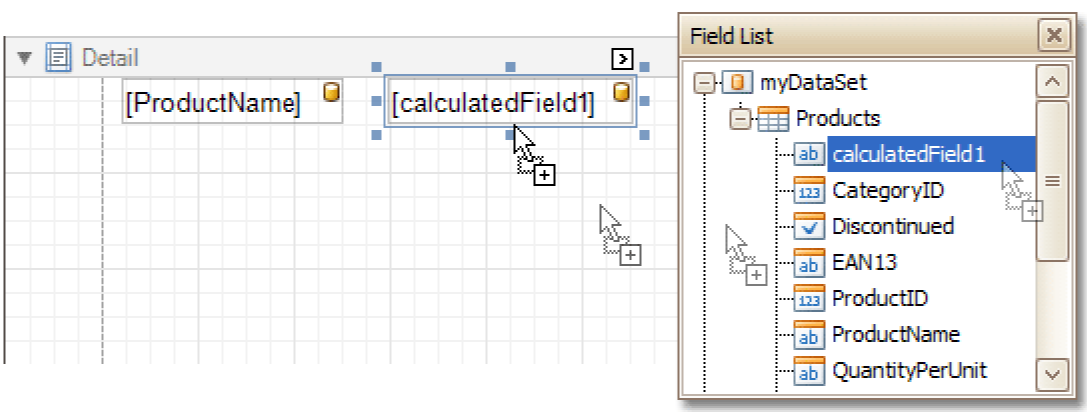
3. Select the calculated field, and in the Property Grid, set its **Field Type** to **String**. Then, click the ellipsis button for its **Expression** property.

And, in the invoked **Expression Editor**, define the required logical condition for the calculated field (e.g. **Iif([UnitsOnOrder] == 0, 'None', [UnitsOnOrder])**, which means that if the **UnitsOnOrder** data field's value is equal to 0, the control's text will be replaced with **None**).

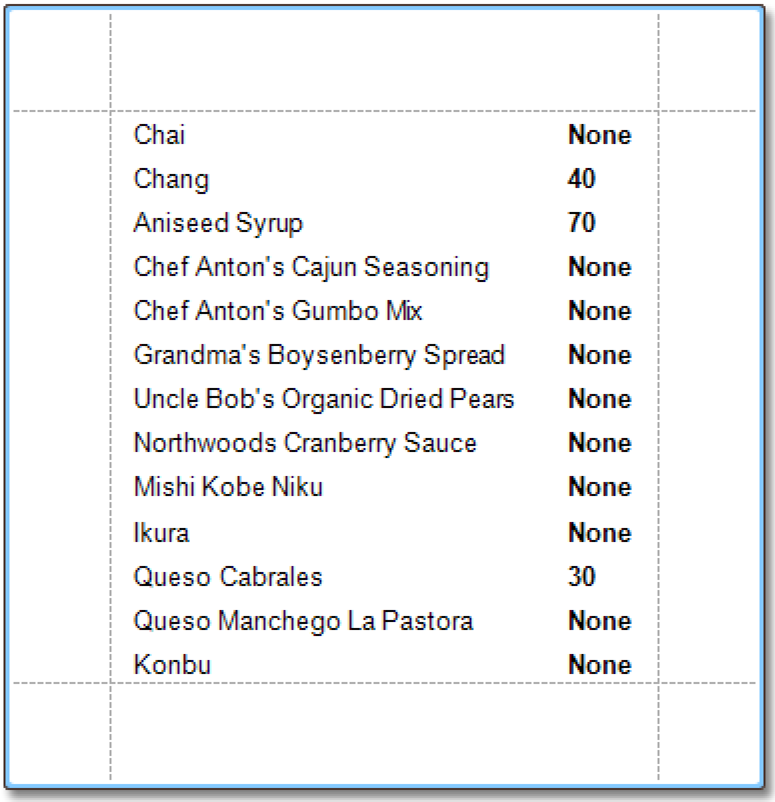


To save the changes and close the dialog, click **OK.**

4. Finally, drop the required data fields (and the created calculated field as well) from the Field List onto the report's Detail band.



The report is now ready. Switch to the Preview Tab, and view the result.

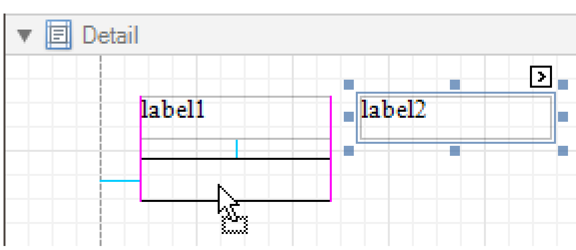


Chai	None
Chang	40
Aniseed Syrup	70
Chef Anton's Cajun Seasoning	None
Chef Anton's Gumbo Mix	None
Grandma's Boysenberry Spread	None
Uncle Bob's Organic Dried Pears	None
Northwoods Cranberry Sauce	None
Mishi Kobe Niku	None
Ikura	None
Queso Cabrales	30
Queso Manchego La Pastora	None
Konbu	None

6.3.5 Change the Layout of Report Elements

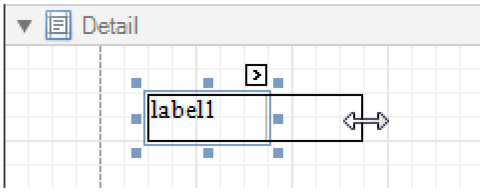
To select a control, click it. To select the next control in tab order, press TAB. To select the previous control in tab order, click SHIFT + TAB.

Individual controls can be moved, using either mouse or keyboard.

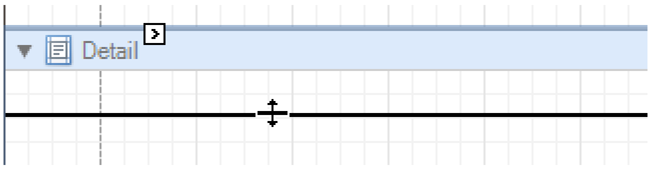


They can be precisely aligned to each other using either Snap Gird or Snap Lines. For details on this, refer to Controls Positioning.

To resize a control using the mouse, select it, and then drag a rectangle drawn on its edge or corner.



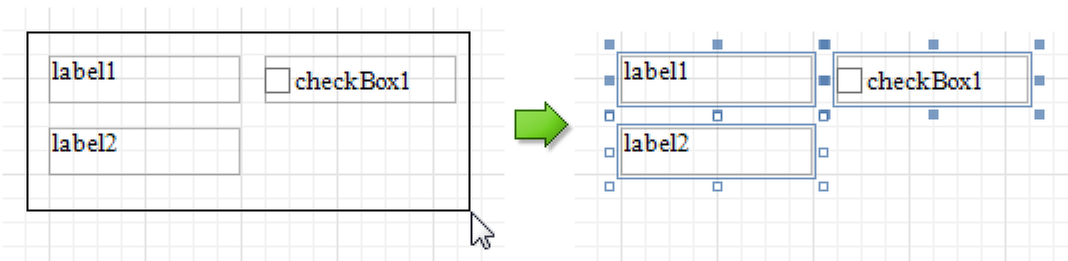
To resize a band, drag its header strip.



To resize an element using the keyboard, press SHIFT+ARROW or CTRL+SHIFT+ARROW.

To select multiple elements, do one of the following.

- Click elements while holding CTRL or SHIFT.
- Click on a blank space and drag the mouse to create a selection frame. When the mouse button is released, all controls within the selection frame's boundaries will be selected. In this case, the previous selection is cleared.

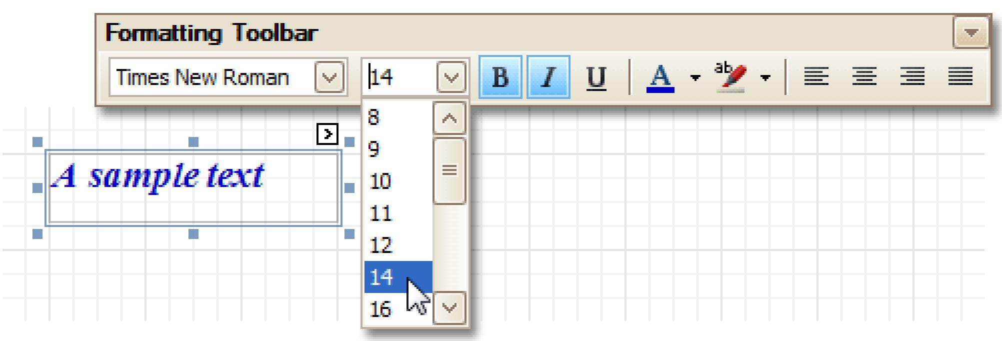


You can also easily align multiple controls or make them the same size, by utilizing the Layout Toolbar.

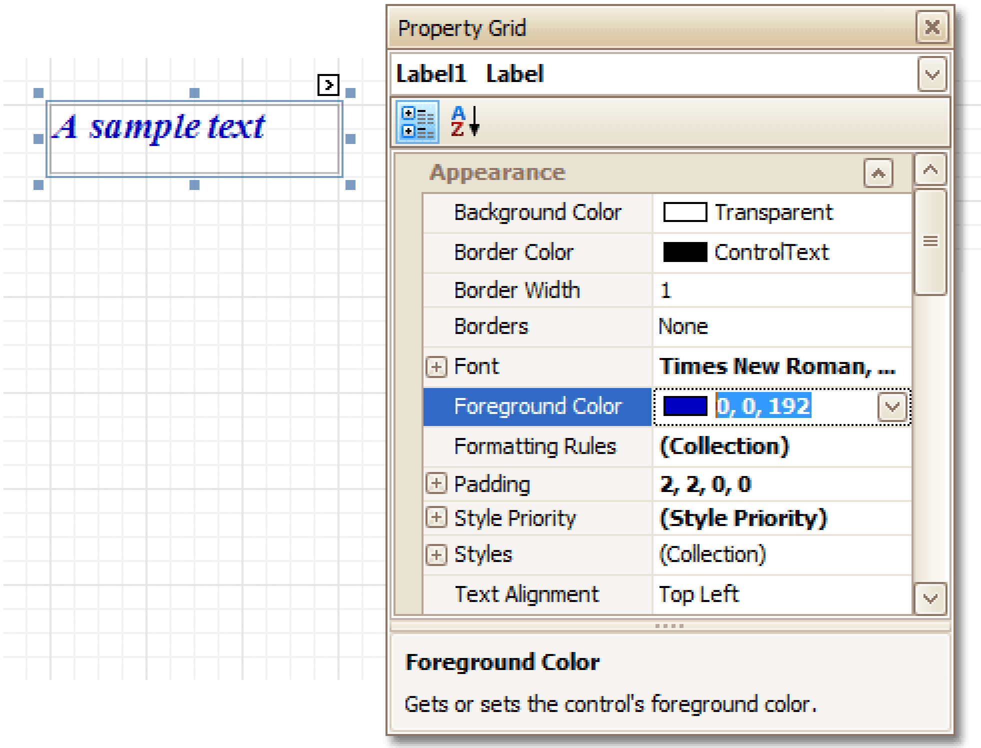
6.3.6 Change Fonts and Colors of Report Elements

To change fonts and colors (as well as paddings, text alignment and other appearance properties) of a report control or band, select this element and do one of the following.

- Use the Formatting Toolbar.



Use the Property Grid, where all appearance-related properties are located under the Appearance category.



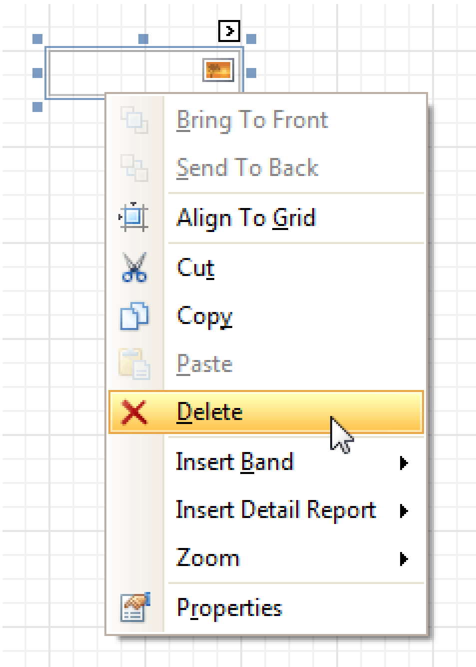
Note that the appearance settings of a band are applied to all controls contained within it.

When it's required to apply styles in bulk, we recommend using common style templates, which also can be stored in an external style sheet file, and applied to multiple reports. In addition, this allows you to specify separate odd/even styles, to improve your reports' readability. Another noteworthy option, is the capability to conditionally change the appearance of report elements based on a certain logical expression (e.g. if a control's value satisfies some rule).

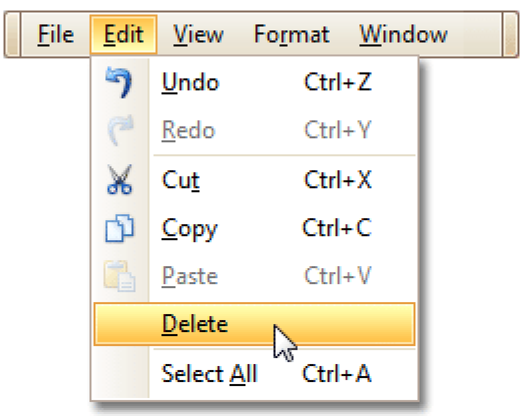
6.3.7 Delete Report Elements

To delete a report element (band or control), select it in the Design Panel or Report Explorer (to select multiple elements, hold down SHIFT while selecting), and then do one of the following.

- Press DELETE.
- Right-click the report element, and in the invoked Context Menu, choose Delete.



- In the Main Menu, select Edit | Delete.



NOTE: You can cancel the operation by pressing CTRL+Z.

Note that certain elements cannot be deleted (such as the Detail band).

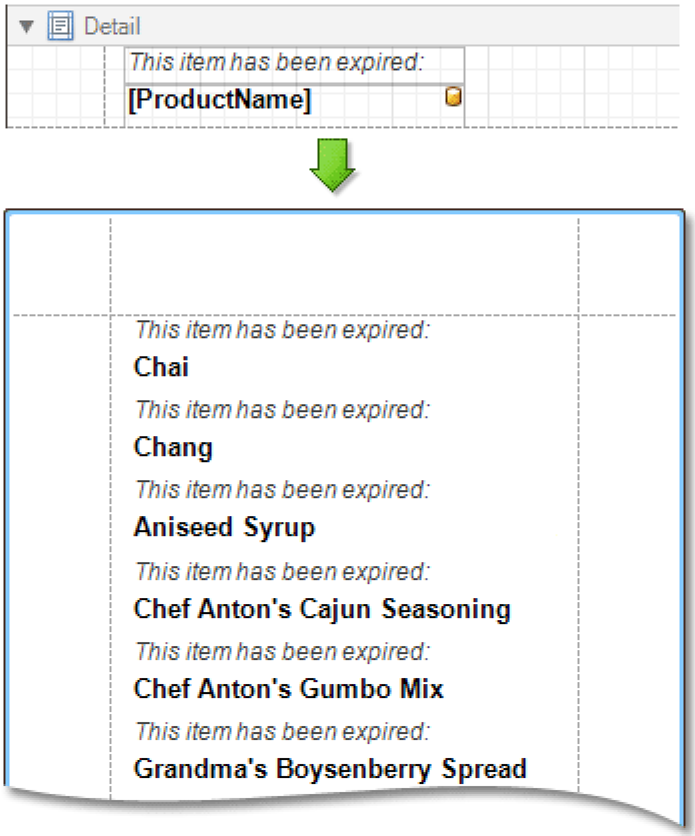
6.3.8 Add or Modify Static Information in Your Report

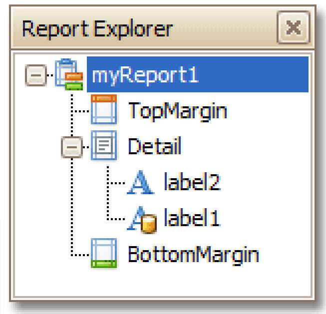
In a report, static and dynamic information is displayed using appropriate controls.

Dynamic information changes through a report, such as values from a database (which comprise the main report data) or service information (such as current user name or page numbers). Approaches to embed dynamic information to your report are detailed in the following document: Displaying Values from a Database (Binding Report Elements to Data).

Static information is text or images that aren't obtained from a data source, and therefore don't change through the report, and don't depend on the current computer. Static information can be printed only once (e.g. in a Report

Header), can repeat on each page (e.g. in a Page Header) or can repeat with every entry in your report's data source (a data-bound label, which is placed onto the Detail band).

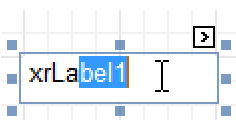




Static information can be either edited in-place, or loaded from an external file.

Change Static Information

Text elements (e.g. Labels and Rich Text Boxes) allow in-place editing of their content. Simply double-click an element and activate the editor.

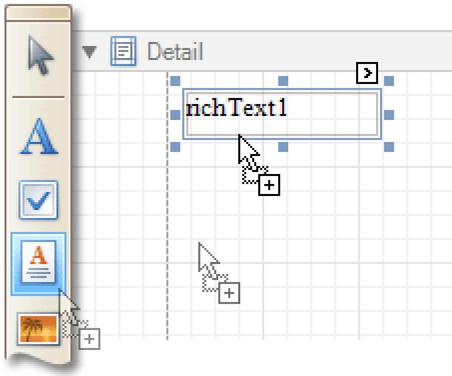


Load Static Information to Your Report

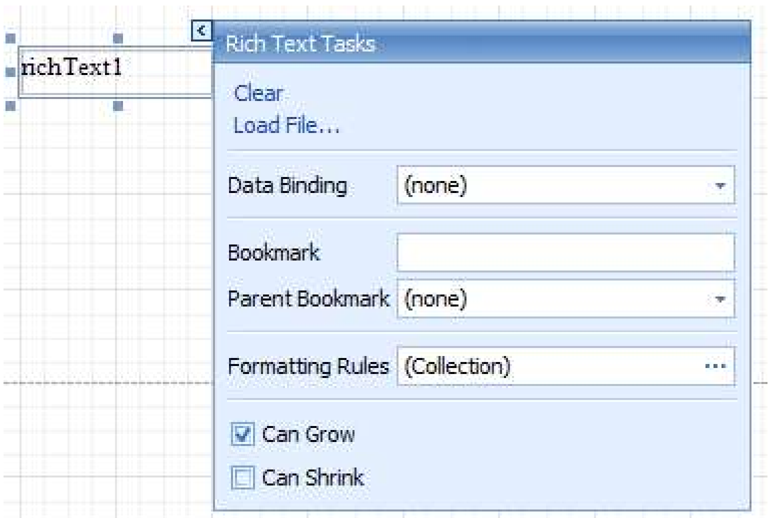
To load static information to your report from an external file, drop an appropriate control from the Control Toolbox (e.g. Label, Rich Text Box or Picture Box). After it is properly positioned, edit its content using the Smart Tag.

For instance, the following instructions describe how to display a rich text (a formatted text with embedded images) into your report.

1. Drop the Rich Text control from the Toolbox onto the Detail band.



2. To load content from an external RTF or TXT file, select the created control and click its Smart Tag. In the invoked actions list, click the Load File... link.



Then, in the invoked dialog, locate the required file, and click Open.

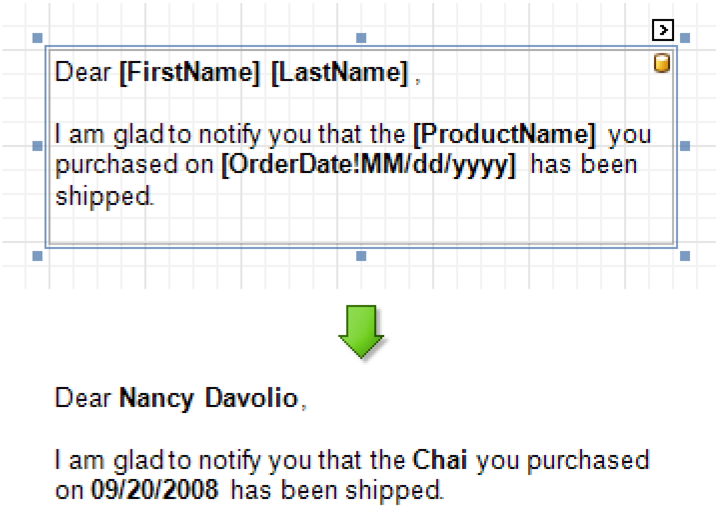
6.3.9 Use Mail Merge in Report Elements

The mail merge feature allows you to combine both static and dynamic content within the same control (e.g. to append some text prefix or postfix to a value obtained from a database), or even bind a control to multiple data fields at one time.

Mail merge is available for the following controls.

- Bar Code
- Check Box
- Label
- Rich Text
- Table Cell
- Zip Code

To embed dynamic data into a control's static content, type in data field names surrounded by [square brackets].



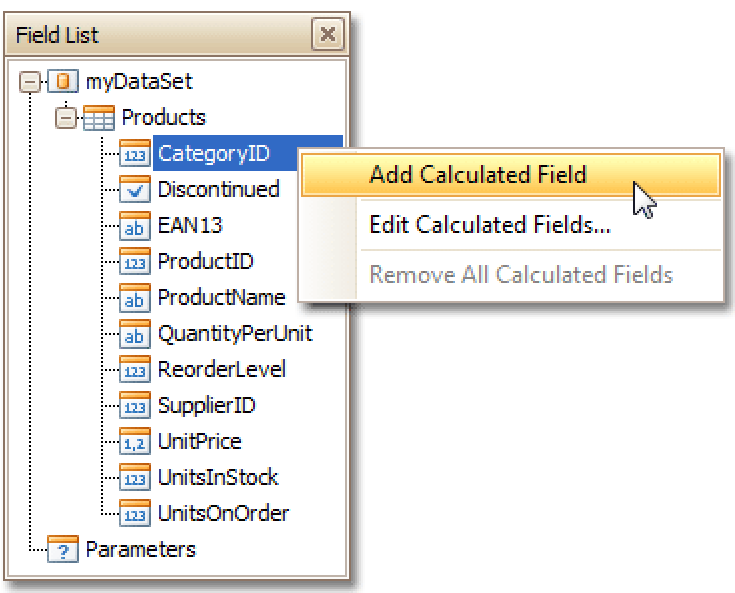
6.3.10 Add Calculated Fields to a Report

This document demonstrates how to add a calculated field to a report. The main purpose of calculated fields is to perform pre-calculations (of virtually any level of complexity) over data fields.

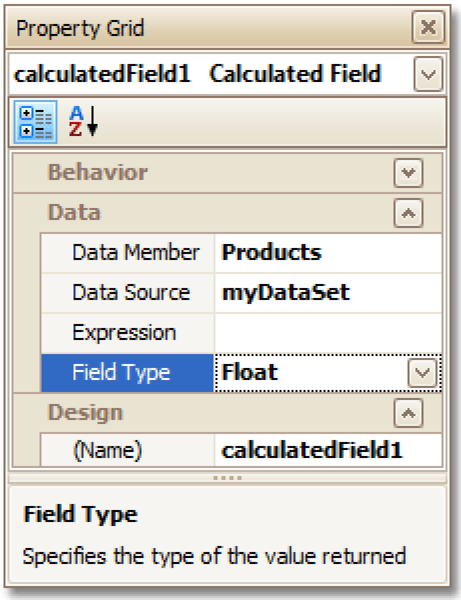
In the Report Designer, a calculated field is similar to an ordinary data field (e.g. you can bind controls to it, and group, sort and filter your report against it).

To add a calculated field to your report, follow the instructions below.

1. To create a calculated field, in the Field List, right-click any data member, and on the invoked menu, choose Add Calculated Field.

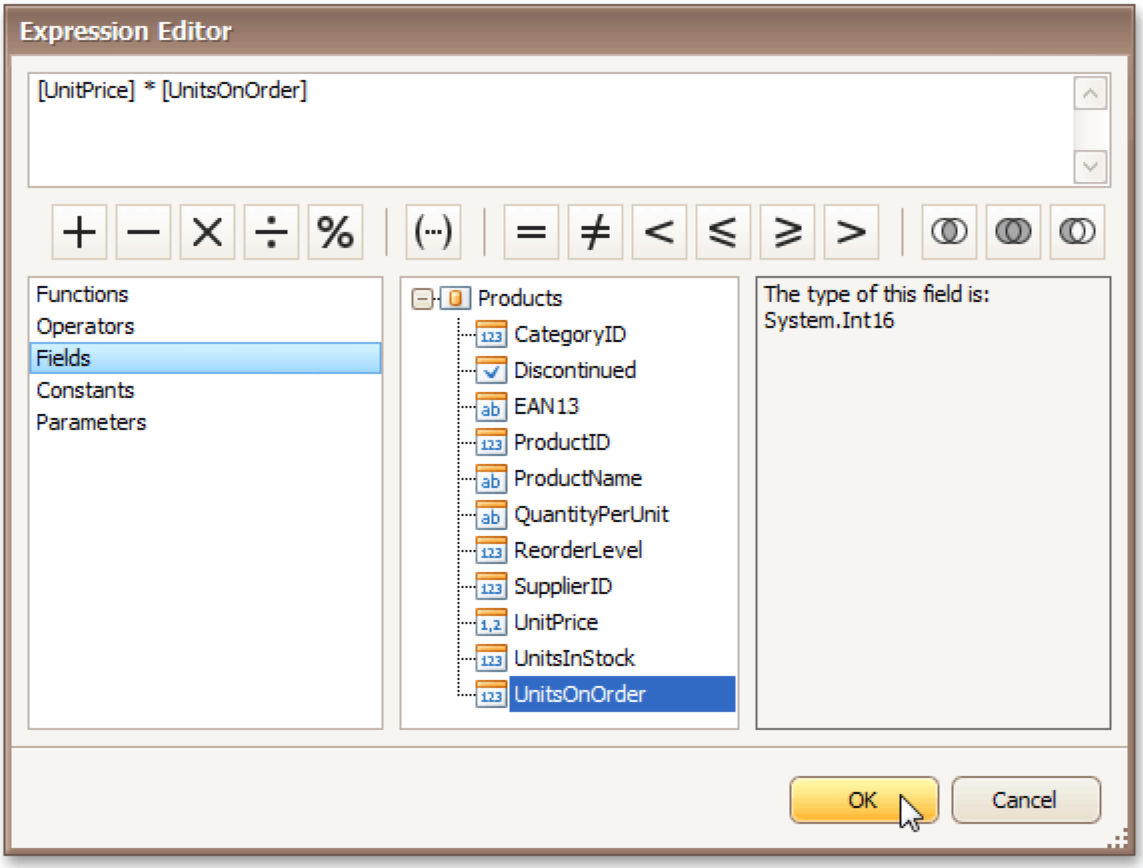


2. In the Field List, select the created field to show its properties in the Property Grid. Among these options, make sure to change the **Field Type** property to an appropriate value.



3. Now, let's create an expression for the calculated field.

Click the ellipsis button in the Expression section, to invoke the Expression Editor. You can also invoke this dialog by right-clicking your calculated field within the Field List and selecting Edit Expression...

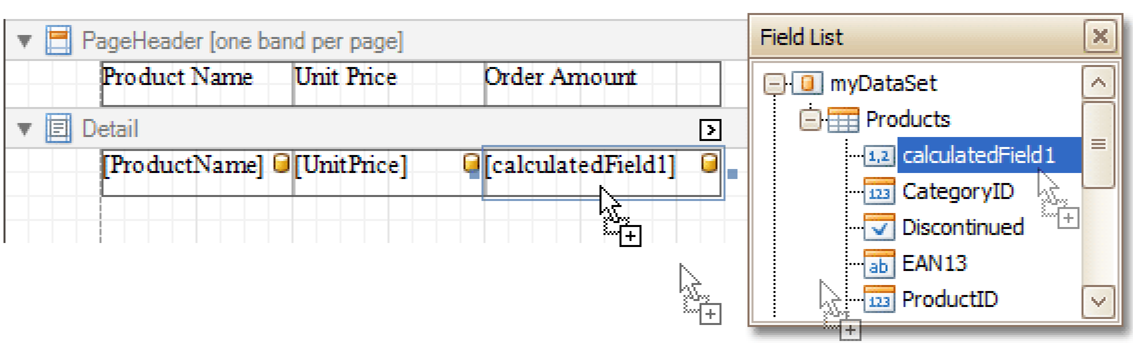


Click Fields to see the field list. Double-click field names to add them to the expression string. Use the toolbar to add operators between field names.

NOTE that it's also possible to employ parameters in a calculated field's expression.

To close the dialog and save the expression, click OK.

4. Finally, drag the calculated field from the Field List onto the required band, just like an ordinary data field.



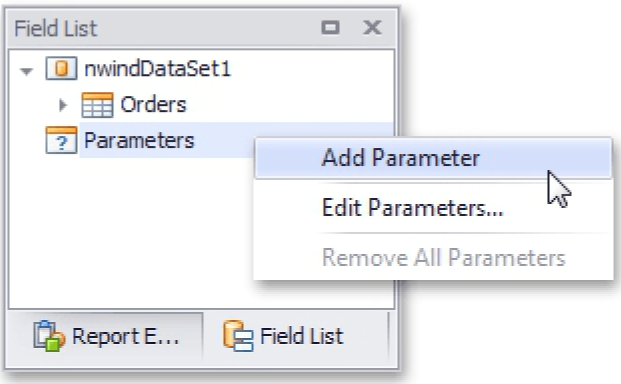
6.3.11 Add Parameters to a Report

For your report, you can employ parameters, which can be requested each time the report is being previewed. And, based on specified values, the report will then being filtered. It is also possible to employ parameters in expressions of calculated fields.

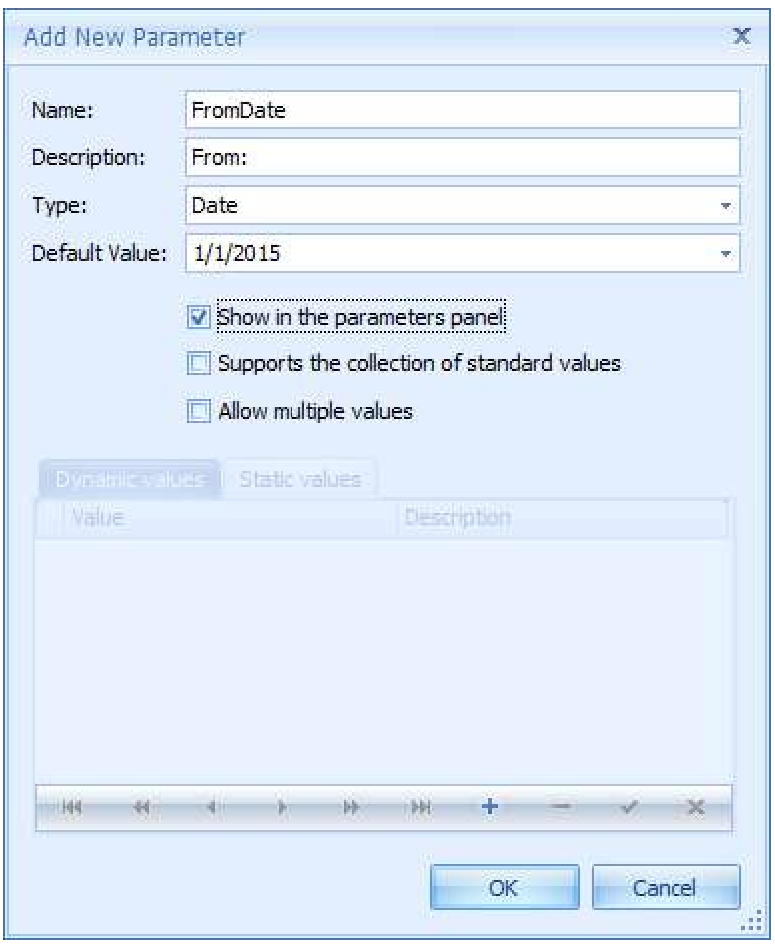
In this example, we'll create two date-time parameters, to filter out orders which don't fall in the specified range, from the report.

To add parameters and filter your report based on their values, follow the steps below.

1. In the Field List window, right-click over the **Parameters** section and in the invoked menu, click **Add Parameter**.



2. In the invoked window for the created parameter, set its **Name** and **Description**. And, make sure to set its **Type** to an appropriate value.

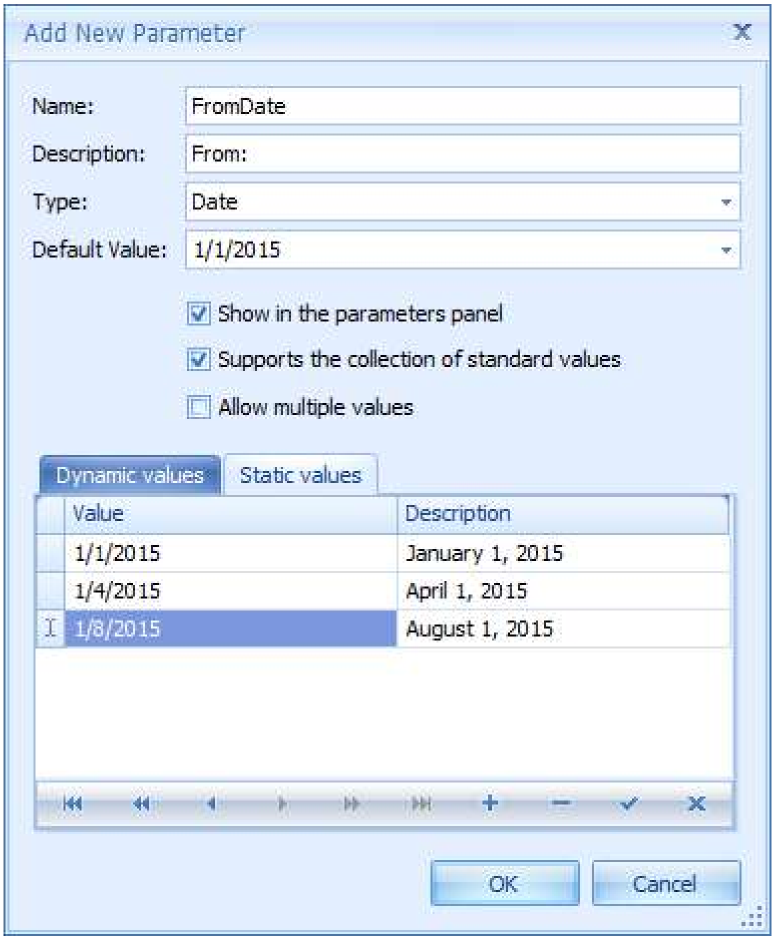


NOTE In Print Preview, the report's document is not generated until you have submitted values of all the parameters that have the Show in the parameters panel option switched on via the Parameters UI.

3. Enabling the **Supports the collection of standard values** option of the parameter allows end-users to modify its value and also activates the **Dynamic values** and the **Static values** tabs of the window:

- On the **Dynamic values** tab, you can specify a parameter's data source, data adapter and data member. The value member defines a data field that provides values to the parameter. The display member defines a data field that provides display names for parameter values (how these values appear in the user interface available in a Print Preview).

- On the **Static values** tab, you can manually fill the list of parameter values, with each value having an individual description (specifying how this value appears in the **Parameters** panel).

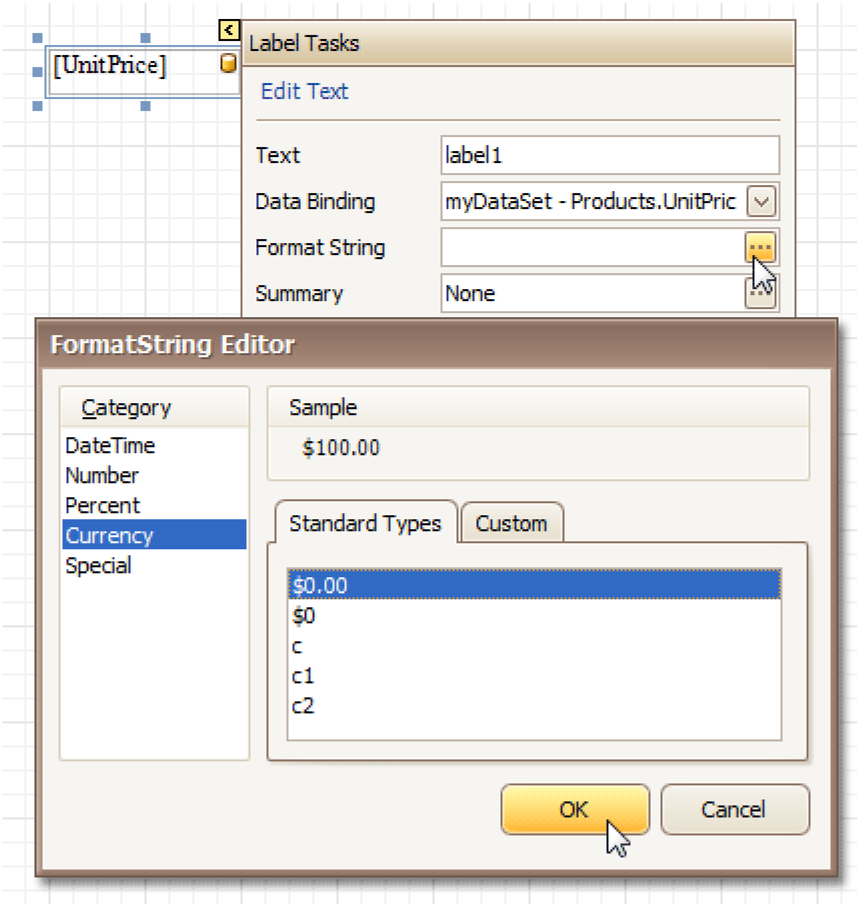


Then, repeat the previous steps to create the second parameter, so that every time your report is previewed, you will be asked to specify two dates.

6.3.12 Change Value Formatting of Report Elements

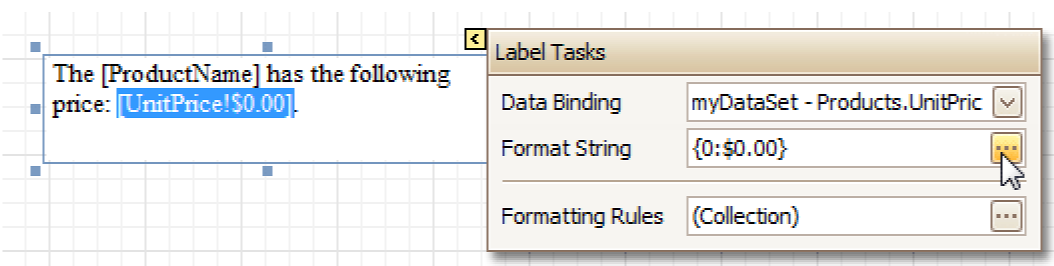
To apply value formatting for a data-bound control's content (e.g. for it to be treated as currency, or date-time content), locate this control, click its Smart Tag, and in the invoked actions list, click the ellipsis button for the **Format String** entry.

Then, in the invoked format string editor, choose one of the predefined formatting styles, or specify a custom one.



To quit the dialog and apply the changes, click **OK**.

Similarly, when the mail-merge is employed for a control's dynamic content, to apply a value formatting to an embedded data field, select it in the in-place editor, and click the control's smart tag. Then, in the invoked actions list, specify the required format.



Note that when a s ummary function is being applied to a control's dynamic content, value formatting is applied separately, via the **Summary Editor**.

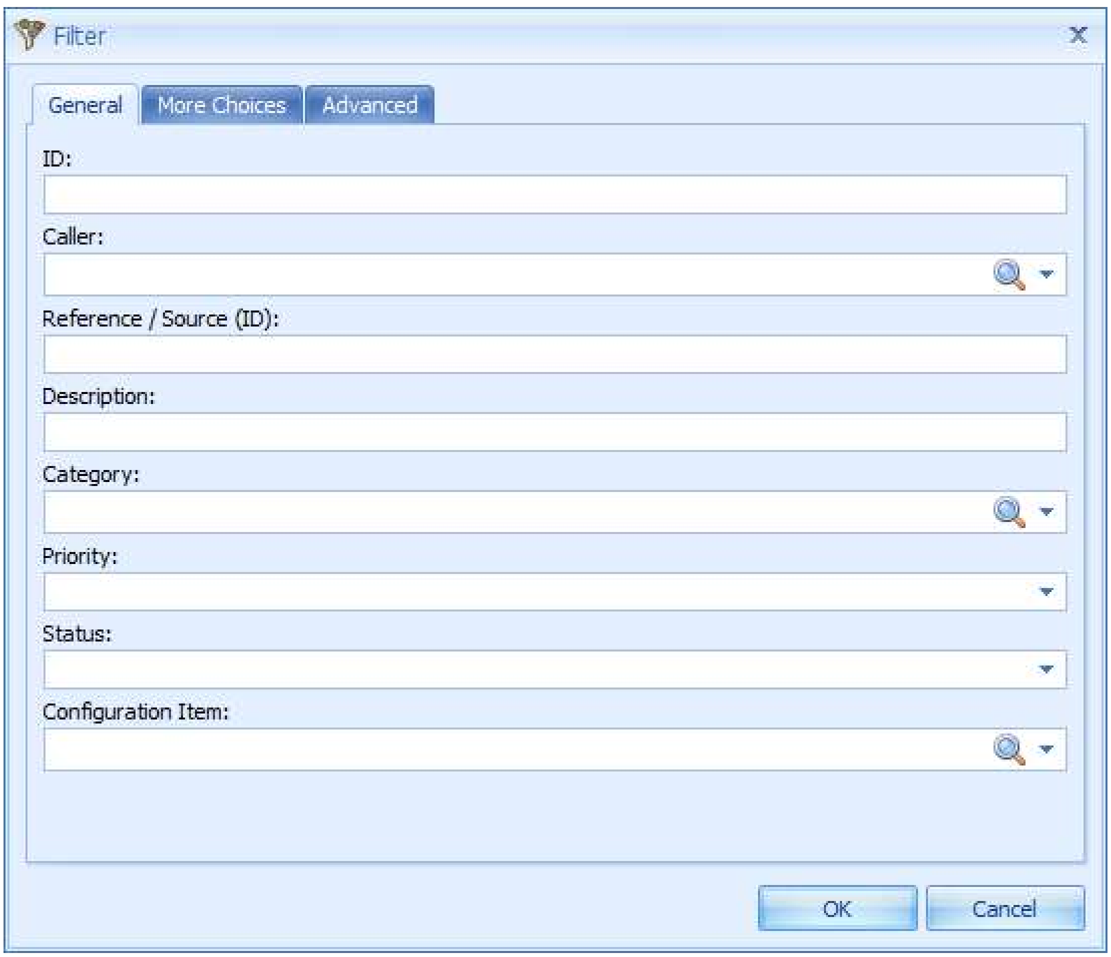
Independently from the general (or, summary) value formatting, you can specify a native XLSX format string, which is to be preserved when the report is being exported to XLSX. This can be done via a control's **Xlsx Format String property**.

6.3.13 Change or Apply Data Filtering to a Report

For your report, you can specify a filtering expression (of virtually any level of complexity), to exclude excessive or undesired data.

To filter a report's data, click the **Filter button** in the **Ribbon:**

You will get the well known filter dialog that you also get in the **Advanced Find** function:



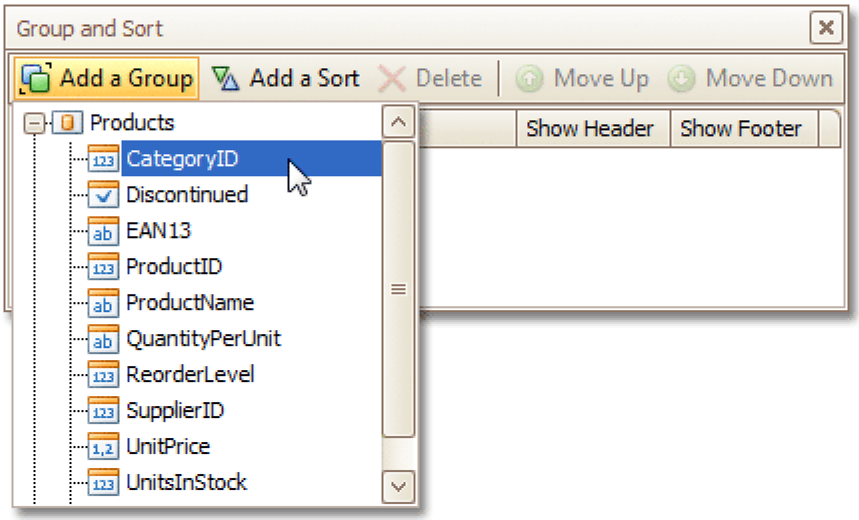
6.3.14 Change or Apply Data Grouping to a Report

This document demonstrates how to group a report's data. Note that data grouping can be performed only if a report is bound to a data source.

To group records in a report, do the following:

1. Create a new report or open an existing report.

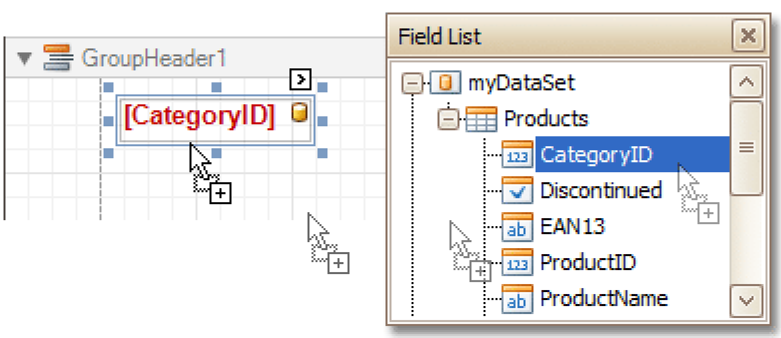
2. Now, switch to the Group and Sort Panel, and click **Add a Group**. In the invoked list, choose a data member across which the report is to be grouped. Note that grouping across calculated fields is supported, as well.



If multiple groups are created, you can specify the priority for each group, by selecting it in the Group and Sort Panel, and using the **Move Up** and **Move Down** buttons.

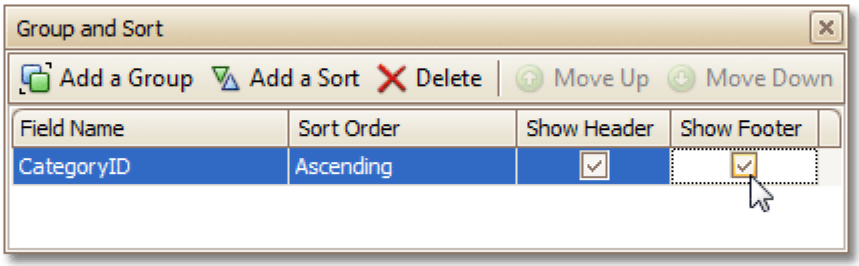
3. After this, a Group Header band is added to the report, with the specified data member being set as its grouping criterion.

Now, it's only left to drop the corresponding item from the Field List onto this band, so that it's displayed as a header for each group.



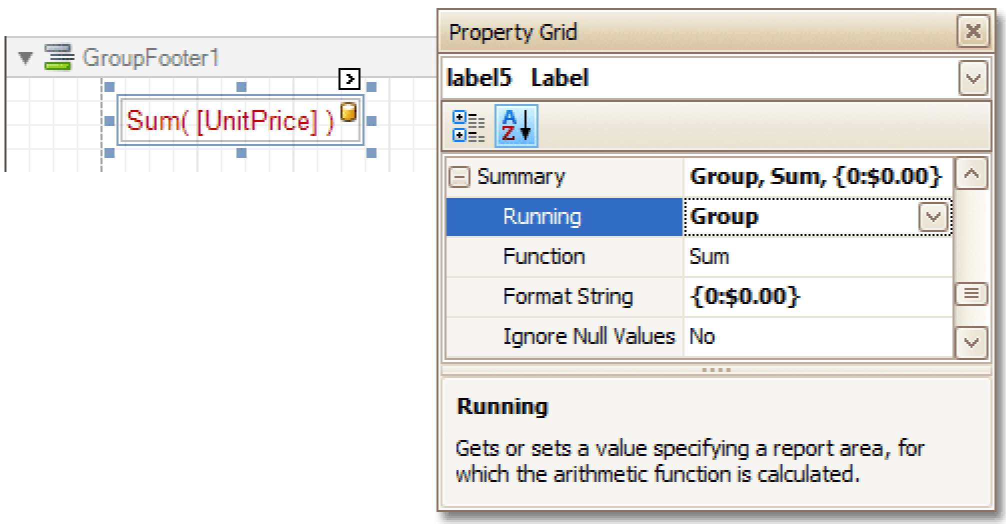
If required, you also can apply mail merge to this label.

4. In addition, you can enable the corresponding Group Footer band, by checking the **Show Footer** option in the Group and Sort Panel.



To manage the sorting order of the group's items (ascending or descending), use the **Sort Order** drop down list.

5. Then, you can calculate a total across the group, by placing a Label onto this band, and specifying its **Summary** properties in the following way.



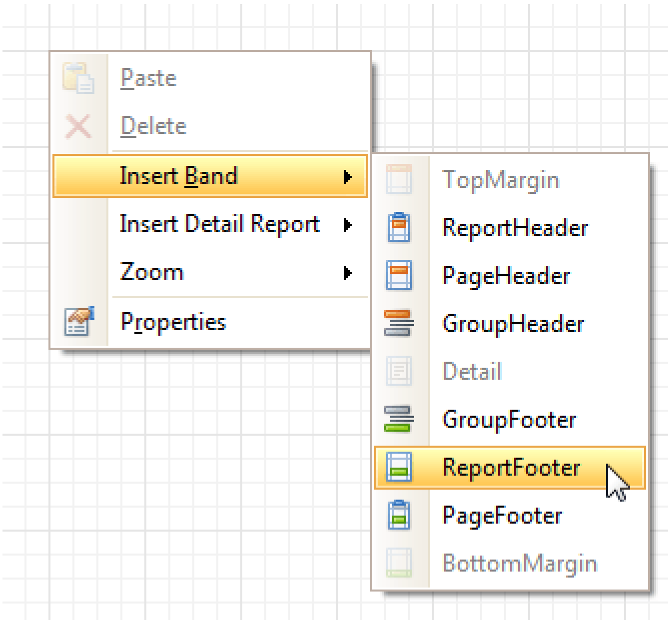
Note also that value formatting is applied to a summary independently of the general formatting, and has a greater priority.

6.3.15 Add Totals to a Report

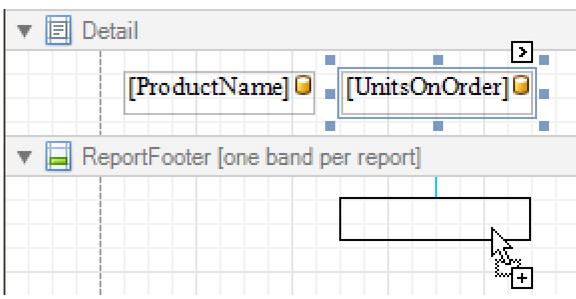
With Report Designer, you can force a data-bound control to calculate one of the standard summary functions (**Average, Summary, Count, Running Summary, Percentage, Max or Min**).

To calculate summaries (totals) within a report, follow the instructions below.

1. To display the result at the bottom of a report, the Report Footer band should be present. To add it, right-click anywhere over the report's area and in the invoked Context Menu, select **Insert Band | ReportFooter**.

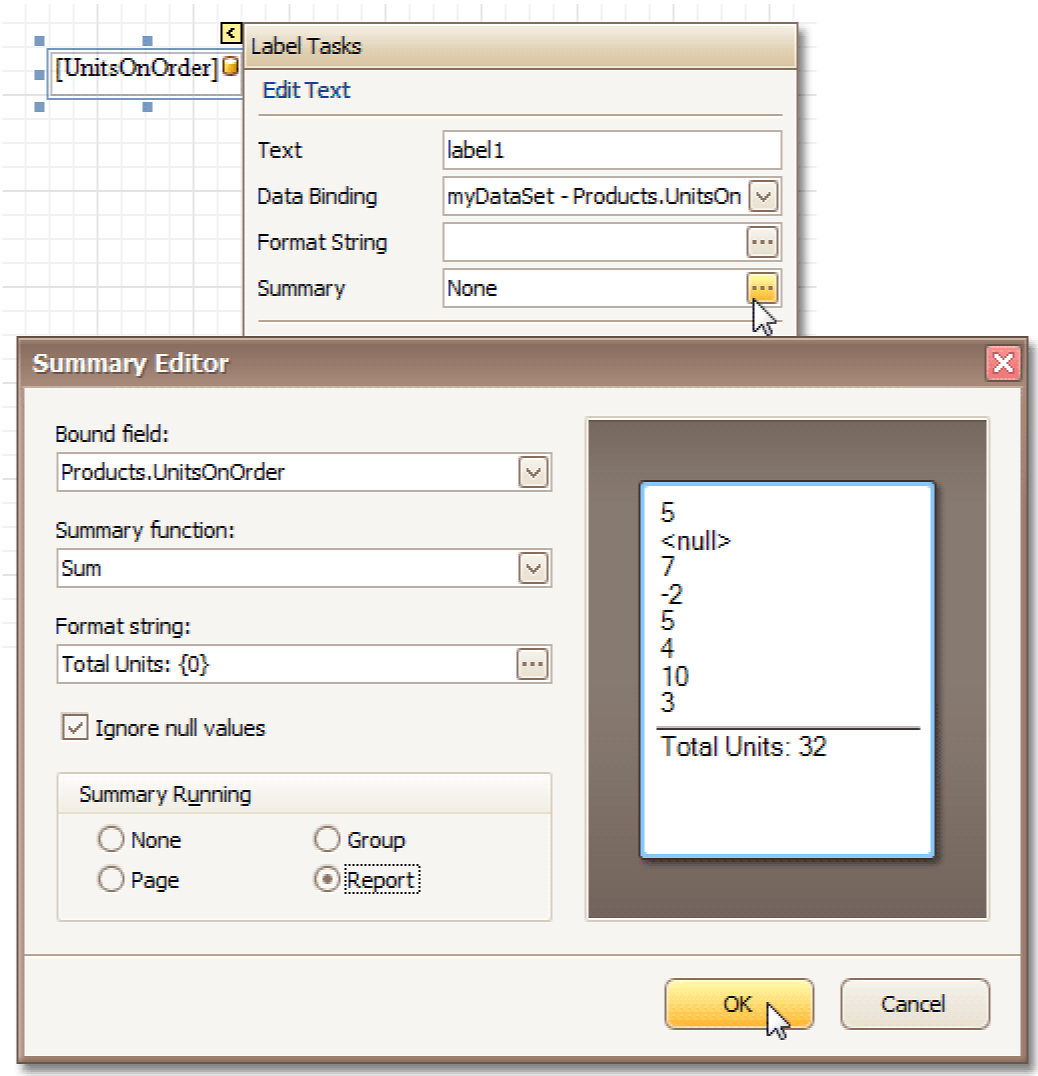


2.Click the field for which a summary will be calculated, to select it. Then, hold down CTRL and drag the field onto the Report Footer area, to create an exact copy of the Label that will display the summary.



3.Now, select the newly created Label, click its Smart Tag, and in its actions list, click the ellipsis button for the Summary item. And, in the invoked Summary Editor, specify the summary options.

The following image shows an example of how you can set up your total. Note that the Summary Running option is set to Report, to ensure that all values from the specified data field are taken into account.



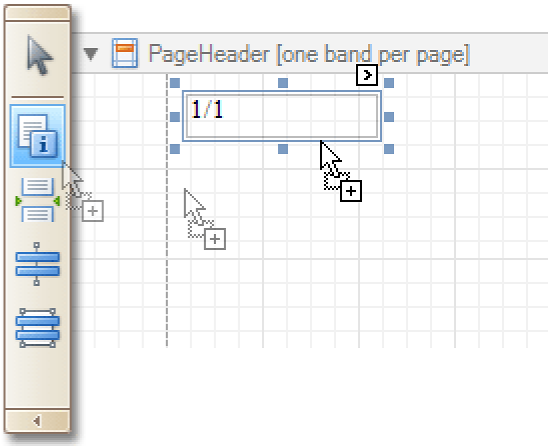
NOTE: The **Ignore NULL values** option won't affect the result in this example, since NULL values are treated like zeros, by default. So, Sum won't change whether these values are taken into account or not. This option makes sense for functions like **Count** or **Average**, because the number of elements counted will depend on it.

Note also that value formatting is applied to a summary independently of the general formatting, and has a greater priority.
When calculating totals for groups, you can sort the groups against a summary function result.
To save the settings and close the dialog, click **OK**.

6.3.16 Add Page Numbers and System Information to a Report

This document describes how to insert page numbers or other system information (e.g. current date and time, us er name, etc.) into a report.

Generally, this information is displayed within the Page Header and Footer or Page Margin bands. To add page numbers or system information to a report, locate the Control Toolbox and drag and drop the Page Info control.

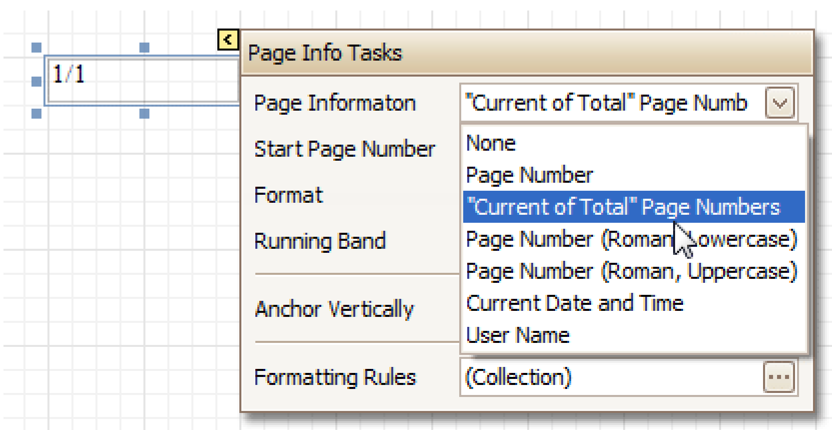


Then, follow the instructions below for your specific task.

- Add Page Numbers
- Add System Date and Time
- Add the User Name

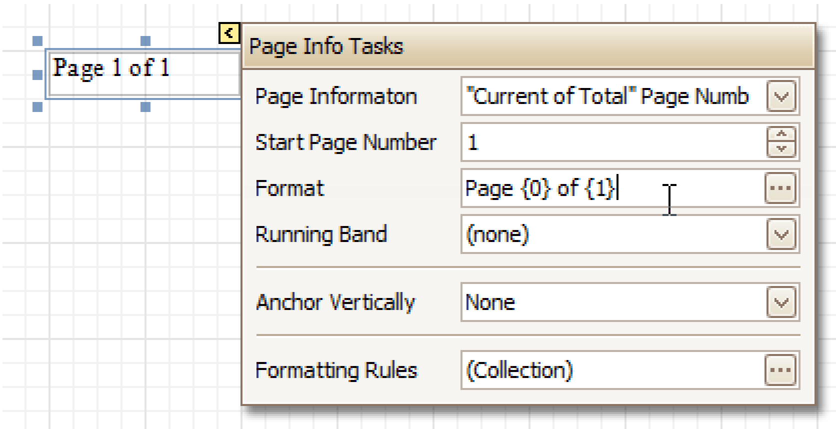
Add Page Numbers

1. Select the **Page Info** control, click its Smart Tag, and in the invoked actions list, expand the drop-down list for the **Page Information** entry.\



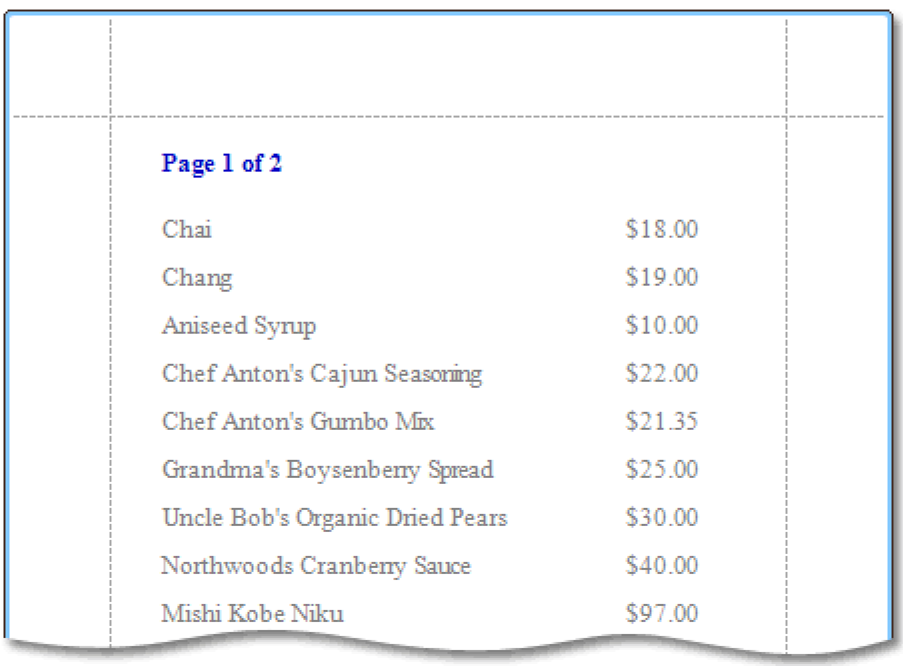
Select whether to display only the page number (Latin or Roman - uppercase or lowercase), or the current page number with total pages.

2. To format the control's text, via its Smart Tag, invoked its actions list, and specify the required format (e.g. **Page {0} of {1}**).



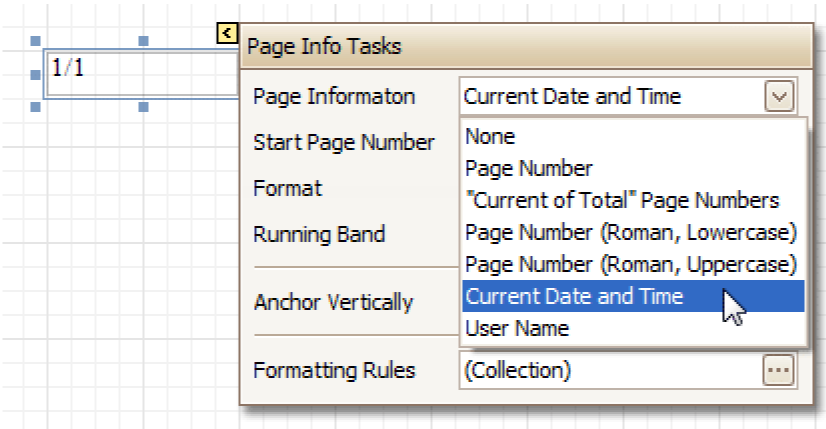
3. Using the control's actions list, you also can specify the s tarting page number, and the running band (e.g. this option is available when there are groups in a report, and it's required to apply independent page numbering for them). For details on this, refer to Add Page Numbers for Groups.

The result is shown below.



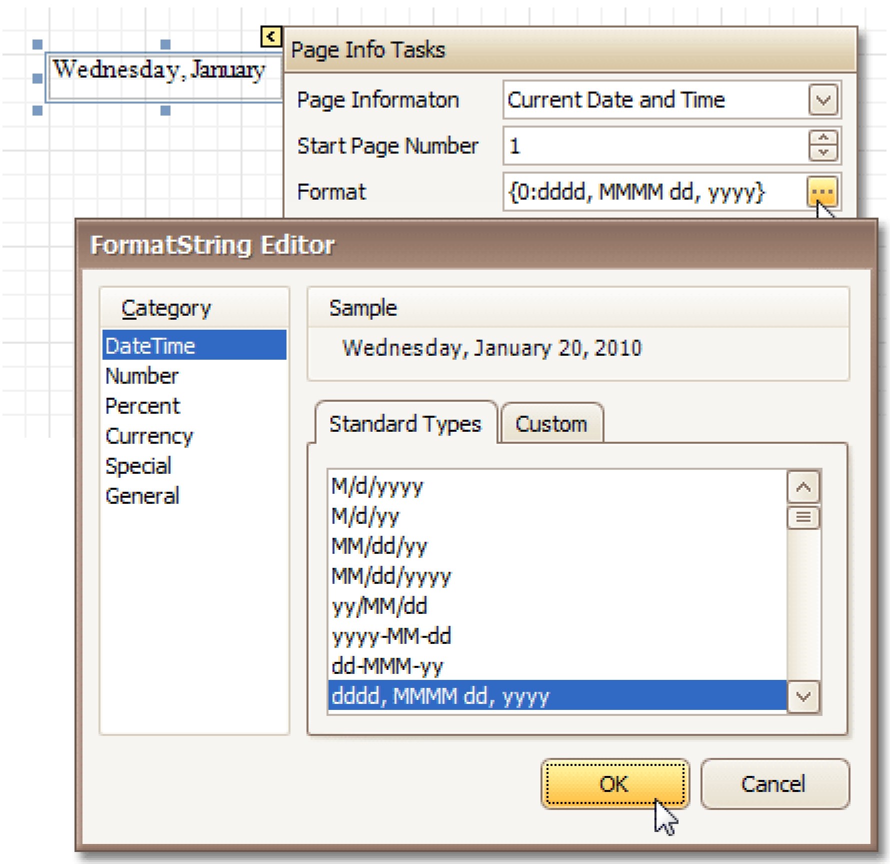
Add System Date and Time

1. Select the **Page Info** control, click its Smart Tag, and in the invoked actions list, expand the drop-down list for the **Page Information** entry, and select **Current Date and Time**.

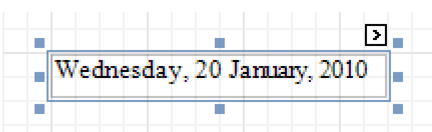


2. To format the control's text, via its Smart Tag, invoked its actions list, and specify the required format.

You can either type it in the **Format** field, or, click its ellipsis button and use the **Format String Editor**.

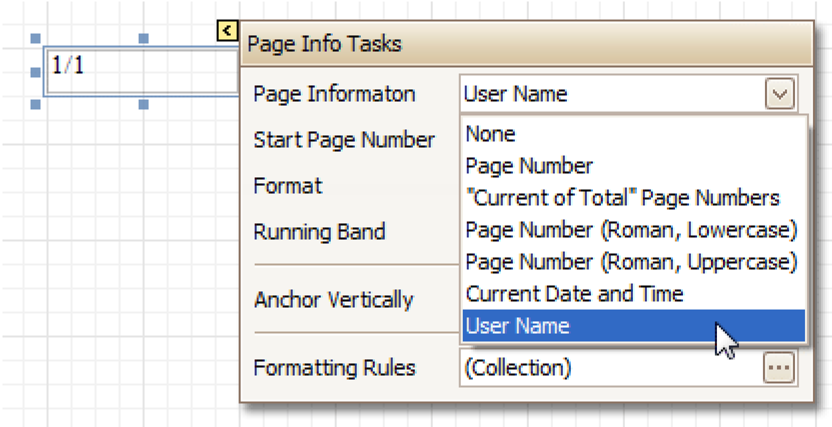


The result is shown below.

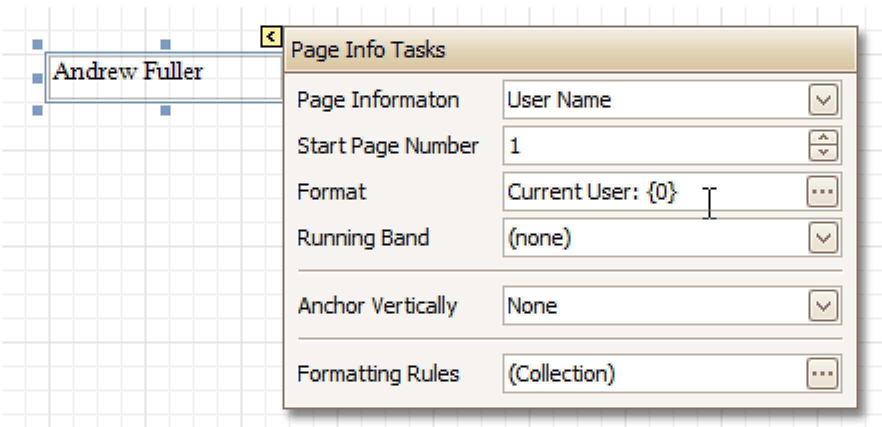


Add the User Name

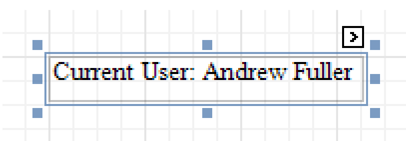
1.Select the **Page Info** control, click its Smart Tag, and in the invoked actions list, expand the drop-down list for the **Page Information** entry, and select **User Name**.



2. To format the control's text, via its Smart Tag, invoke its actions list, and specify the required format (e.g. **Current User: {0}**).



The result is shown below.



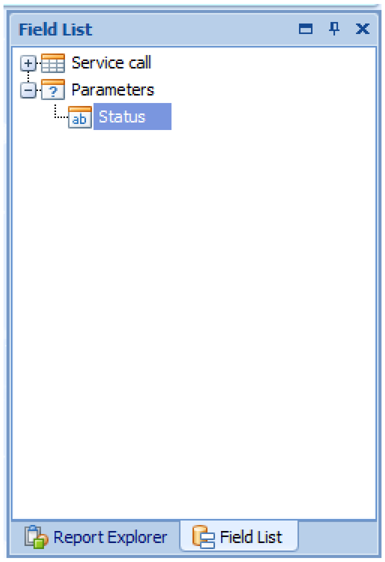
6.4 Advanced Report topics

With the help of the Report Designer, you can edit existing reports, as well as create your own reports from scratch. The following sections contain tutorials providing step-by-step instructions on both basic and advanced report customization.

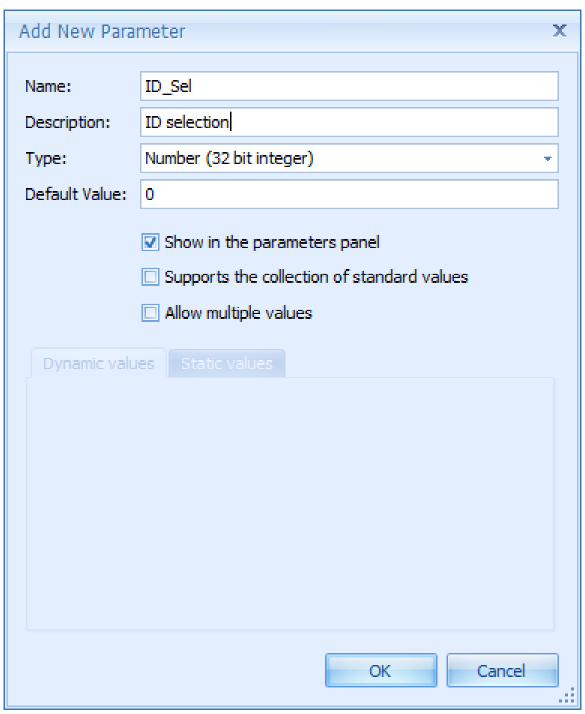
6.4.1 Use parameters in filters

To use parameters at runtime and use these in your report's filter take the steps described below.

Open or create a report and go to the **Field List** control:



Right click on the Parameters branch and select **Add parameter.**



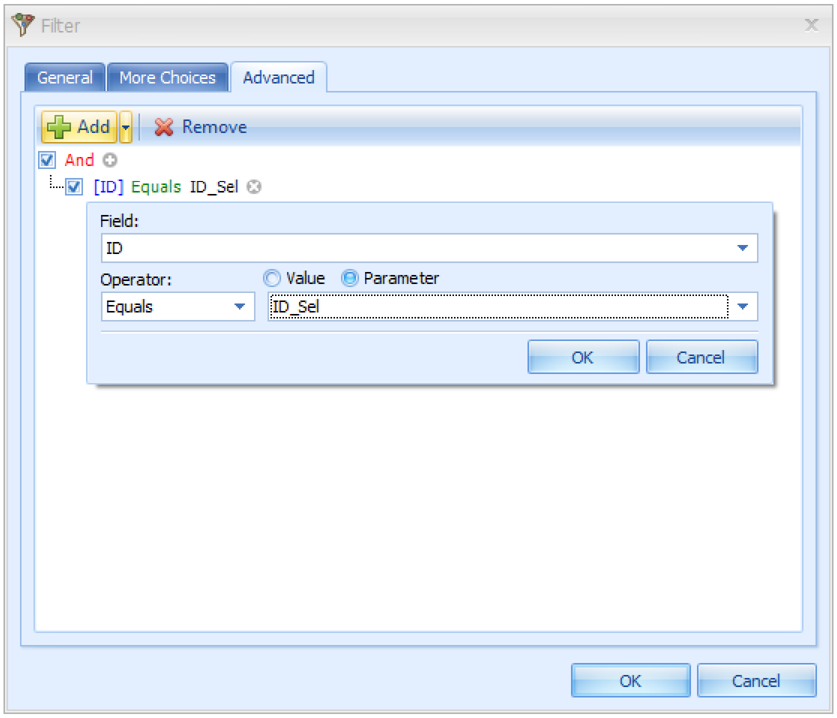
Fill in the necessary information.

Show in the parameters panel - if checked this parameter is shown when running the report so a value can be filled in.

Supports the collection of standard values - If checked you can define a static or dynamic list the user can choose a value from when running the report.

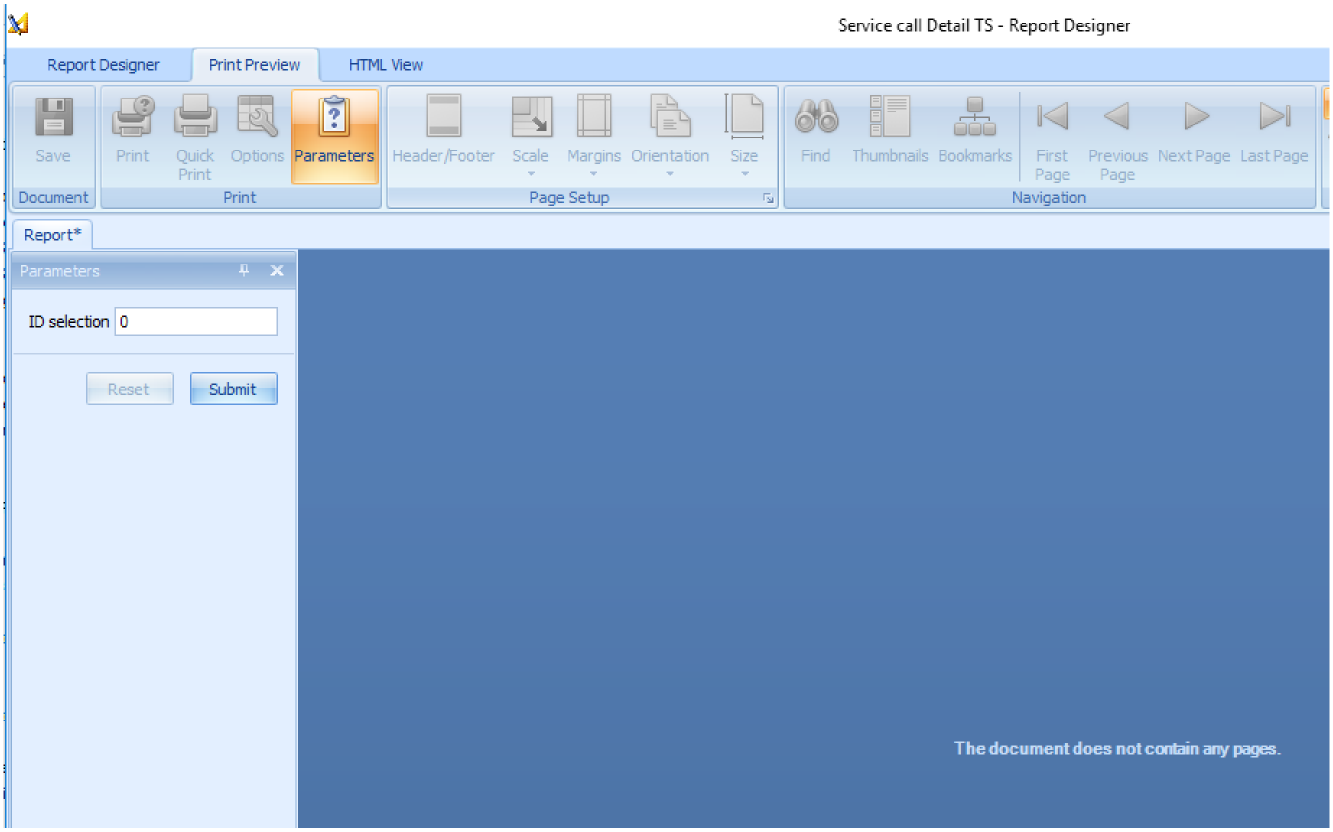
Allow multiple values - If checked the user can select more than one value to pass on to the report.

In order to use the parameter as value in the filter go to the filter by clicking the **Filter** button on the ribbon. In the filter window go to the advanced panel and select the field you wish to use. Then select **Parameter**. You can now choose from the available parameters:



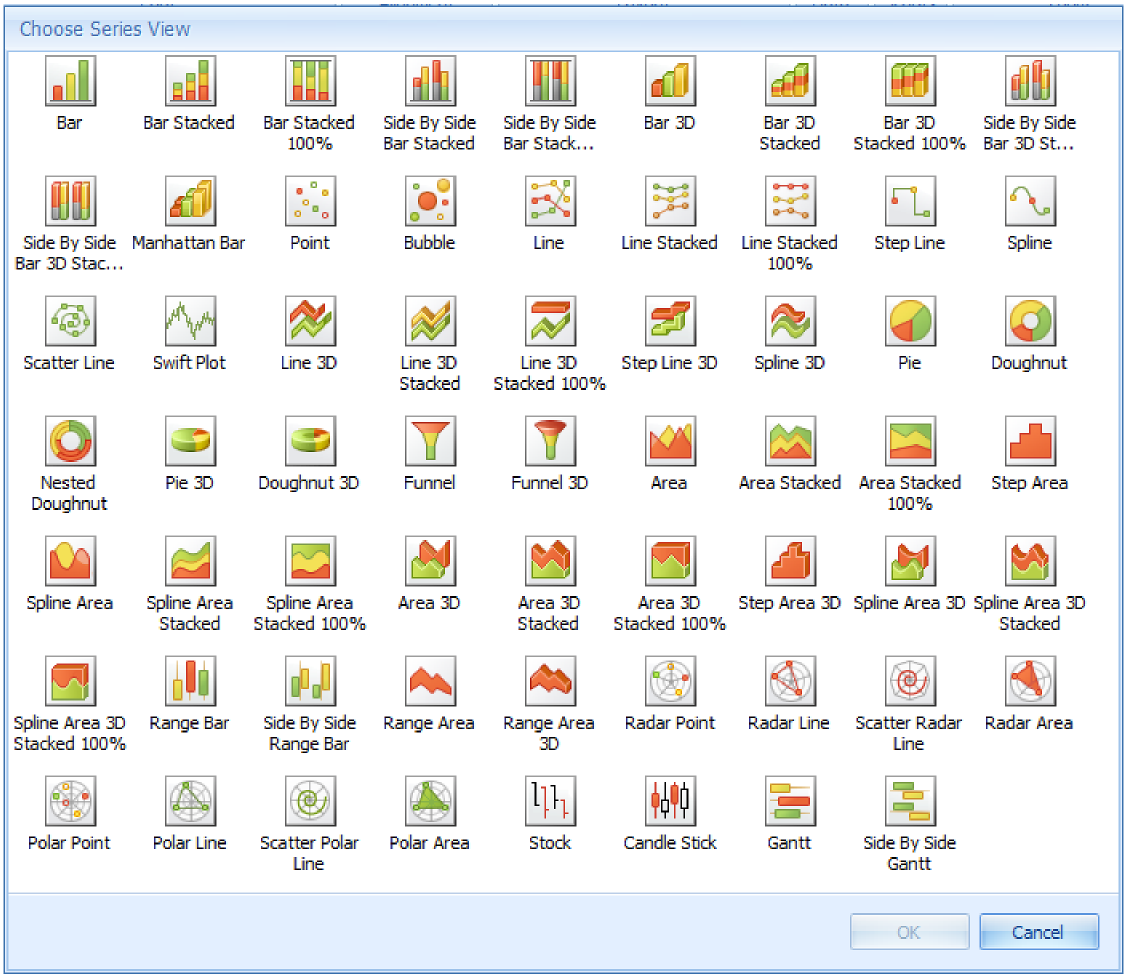
Click OK twice and then run your report.

You will see a panel on the left side with the parameter(s) you defined. You can enter a value here and press **Submit** to run the report.


Service call Detail TS - Report Designer
Report Designer
Print Preview
HTML View
Save
Print
Quick Print
Options
Parameters
Header/Footer
Scale
Margins
Orientation
Size
Find
Thumbnails
Bookmarks
First Page
Previous Page
Next Page
Last Page
Document
Print
Page Setup
Navigation
Report*
Parameters
ID selection
0
Reset
Submit
The document does not contain any pages.

6.4.2 Charts

Smart Reporting supports a wide range of charts that can be used to enhance your reports:



Charts can be configured in a lot of ways. The following chapter describes how to create a basic bar chart.

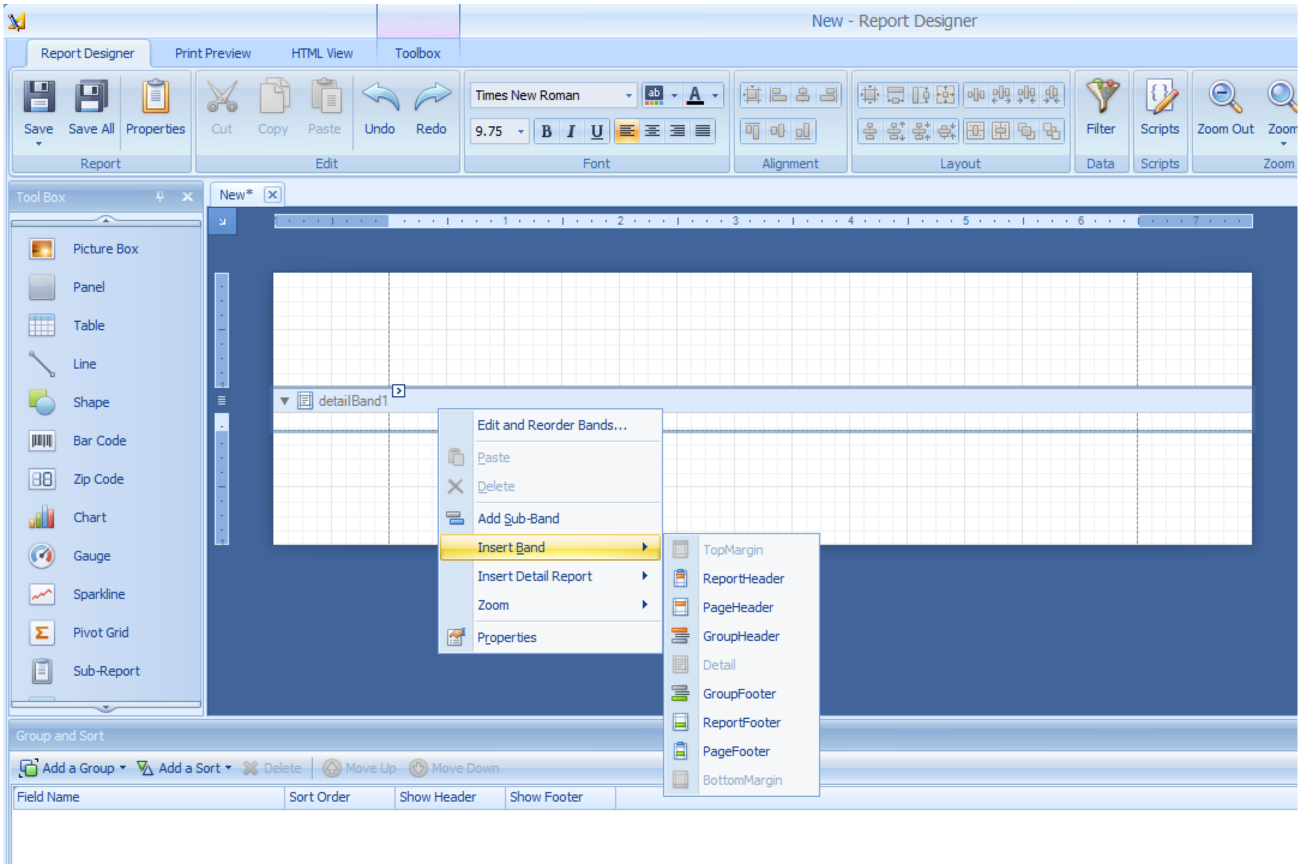
6.4.2.1 Create chart

This chapter describes how to create a basic bar chart which will count the number of service calls per status.

Go to the Administration - Reporting - Reports function and then select the Service call entity.

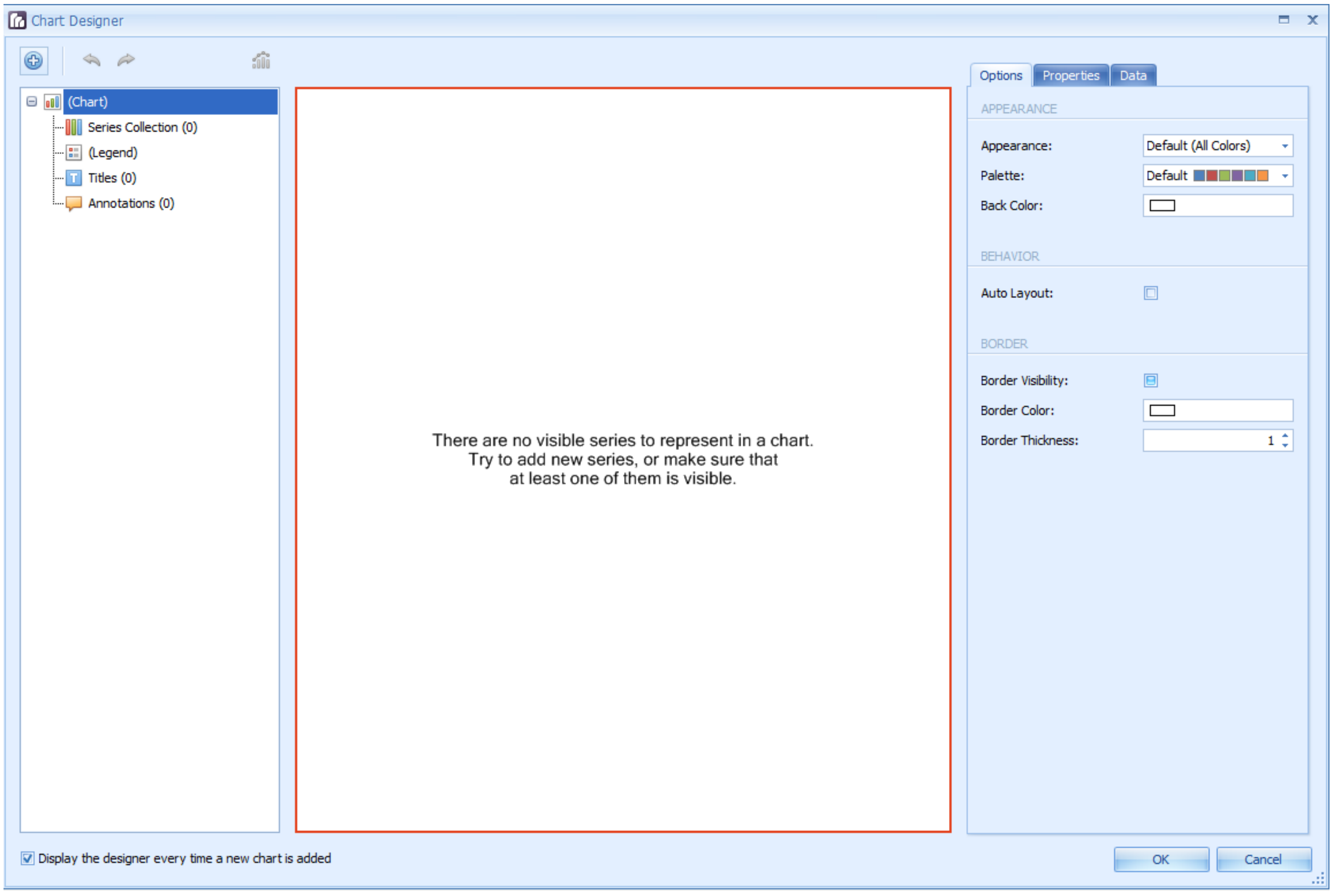
Create a new report.

In this report create a new GroupHeader Band:



Then select Chart from the Toolbox on the left and drag that to the newly created Band.

When the chart item is dropped on the report you automatically get the following dialog:



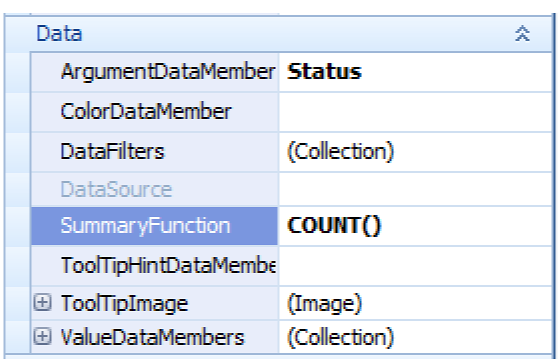
Go to the Series Collection on the left side and click the + to create a new series.

Choose for **Bar**

Go to the Properties tab on the right and scroll to the Data section.

Fill in **Status** as ArgumentDataMember

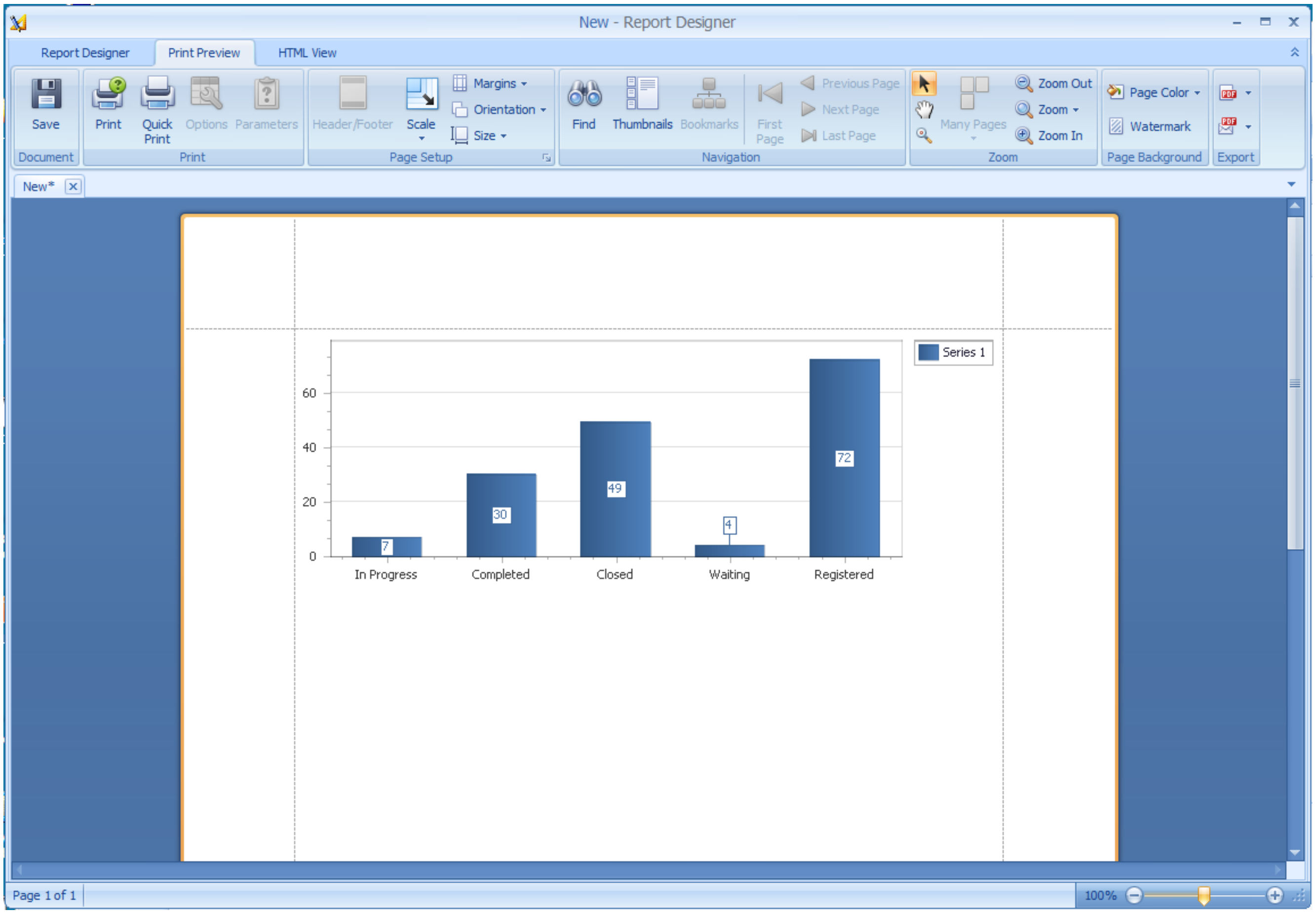
Fill in **COUNT()** as SummaryFunction



Press the **OK** button

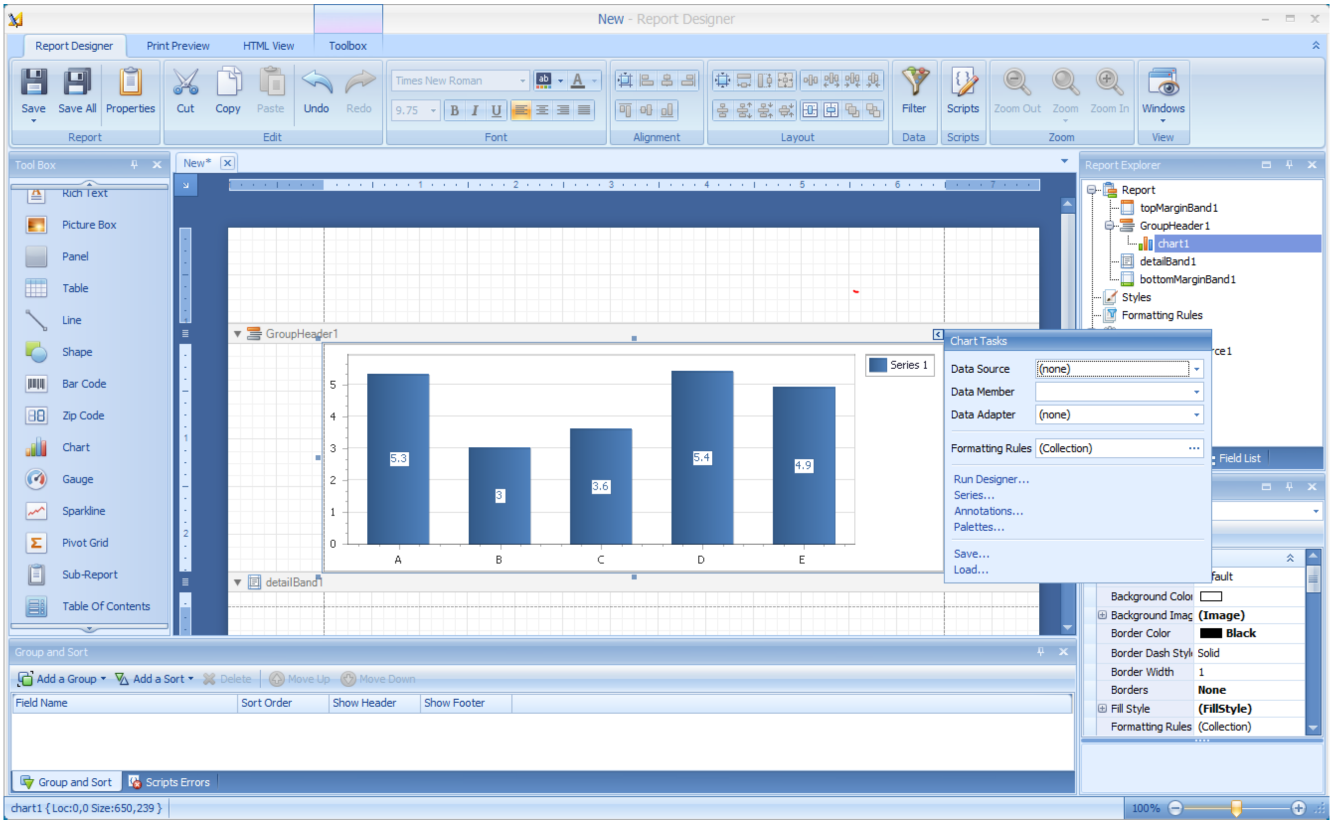
Click on the **Print preview** tab in the Report Designer.

Your chart will look something like this:



To further modify the chart you can go back to the chart designer by clicking on the  icon next to the chart (the icon is only visible if you have selected the chart item in the Report Designer).

You will get a context menu where you can select **Run Designer...** to go to the chart designer:



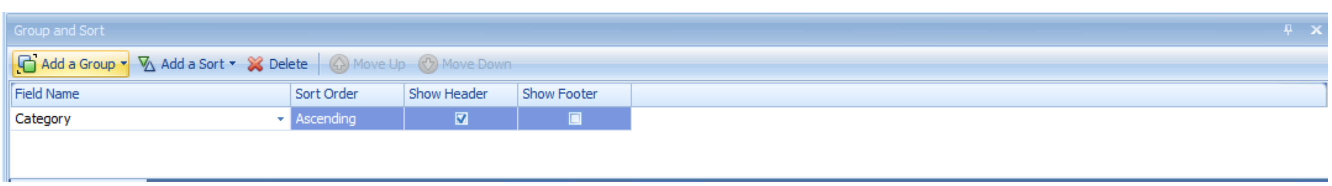
6.4.2.2 Link Chart to Group Data

Charts use the report filter to filter the data that they are showing. They are not automatically using grouped data to modify their filter. If you want to do that you need to use a little piece of script to dynamically set the filter of the chart.

In this example we are going to create a report that shows a chart of Service Calls per Status and break that down per Category.

Create a new report.

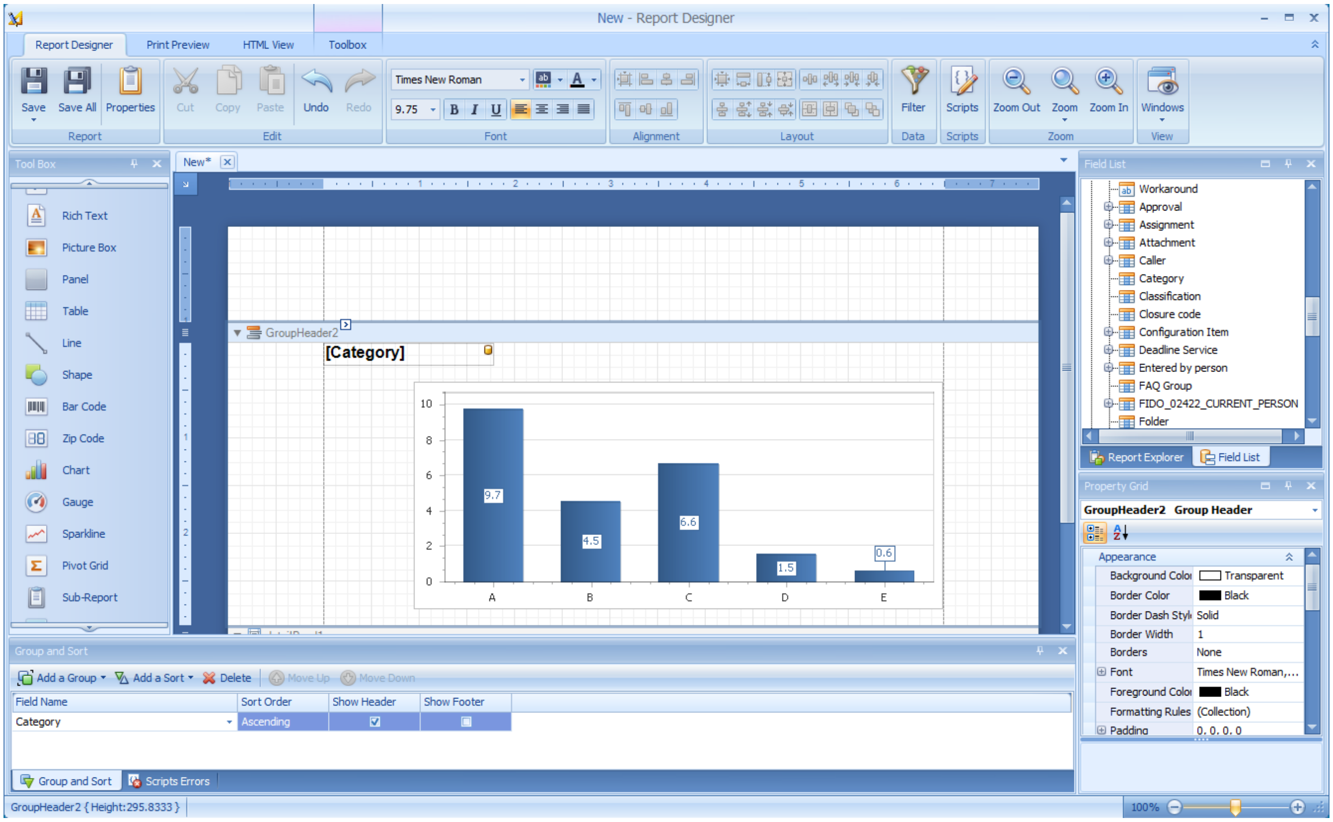
Click on the **Add a Group** button in the **Group and Sort** section in the Report Designer and select **Category**:



This will automatically create a new GroupHeader Band.

In this band create the chart as was explained in Create chart

Then place the **Category** field in this GroupHeader Band by dragging it from the **Field List** to the report:



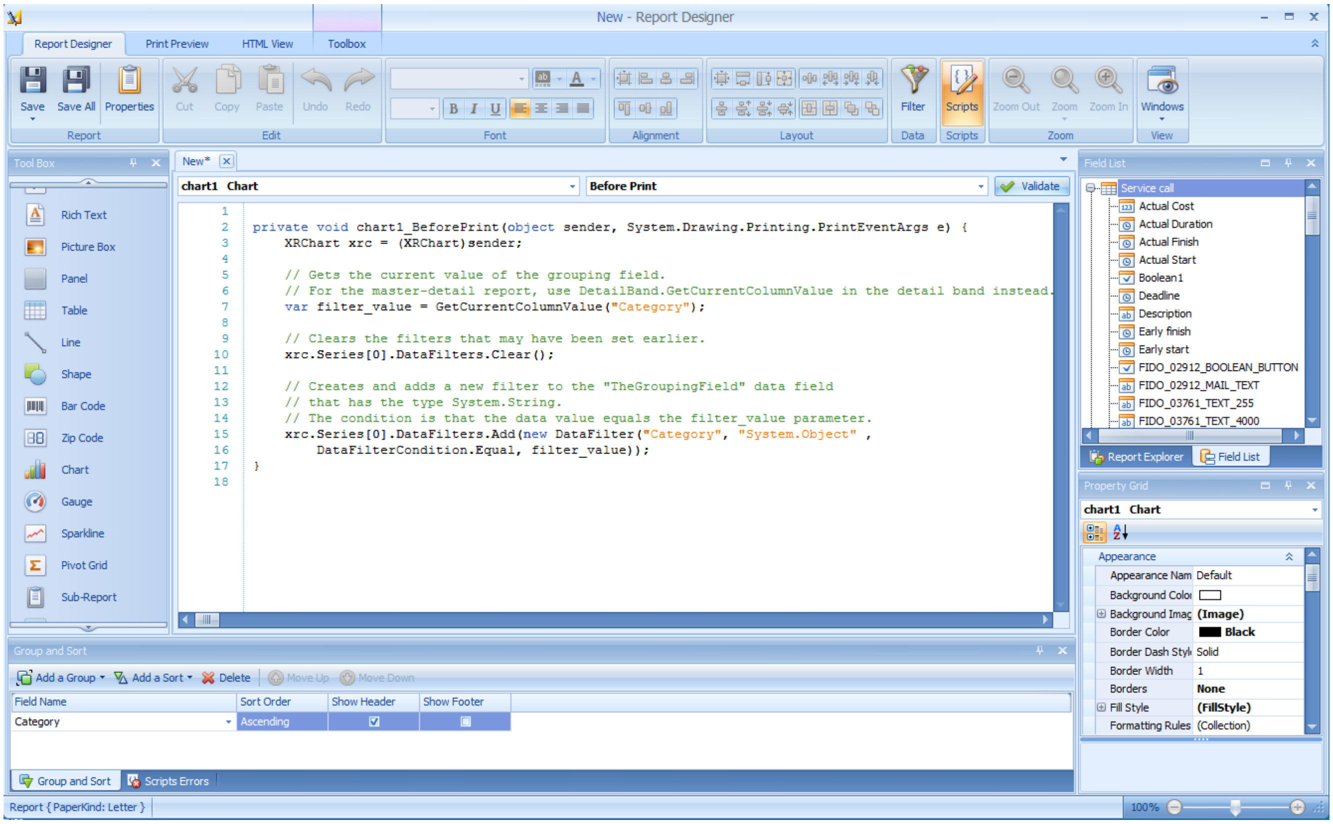
If you now run the report you will get a chart per **Category** but all charts have the same data.

To change this add scripting to the report.

Click on the button **Scripts** in the toolbar and add a **Before Print** script for the chart that looks like this:

```
private void chart1_BeforePrint(object sender, System.Drawing.Printing.PrintEventArgs
e) {
    XRChart xrc = (XRChart)sender;

    // Gets the current value of the grouping field.
    // For the master-detail report, use DetailBand.GetCurrentColumnValue in the detail
band instead.
    var filter_value = GetCurrentColumnValue("Category");

    // Clears the filters that may have been set earlier.
    xrc.Series[0].DataFilters.Clear();

    // Creates and adds a new filter to the "TheGroupingField" data field
    // that has the type System.String.
    // The condition is that the data value equals the filter_value parameter.
    xrc.Series[0].DataFilters.Add(new DataFilter("Category", "System.Object" ,
        DataFilterCondition.Equal, filter_value));

}
```


This will look like this in the Report Designer:



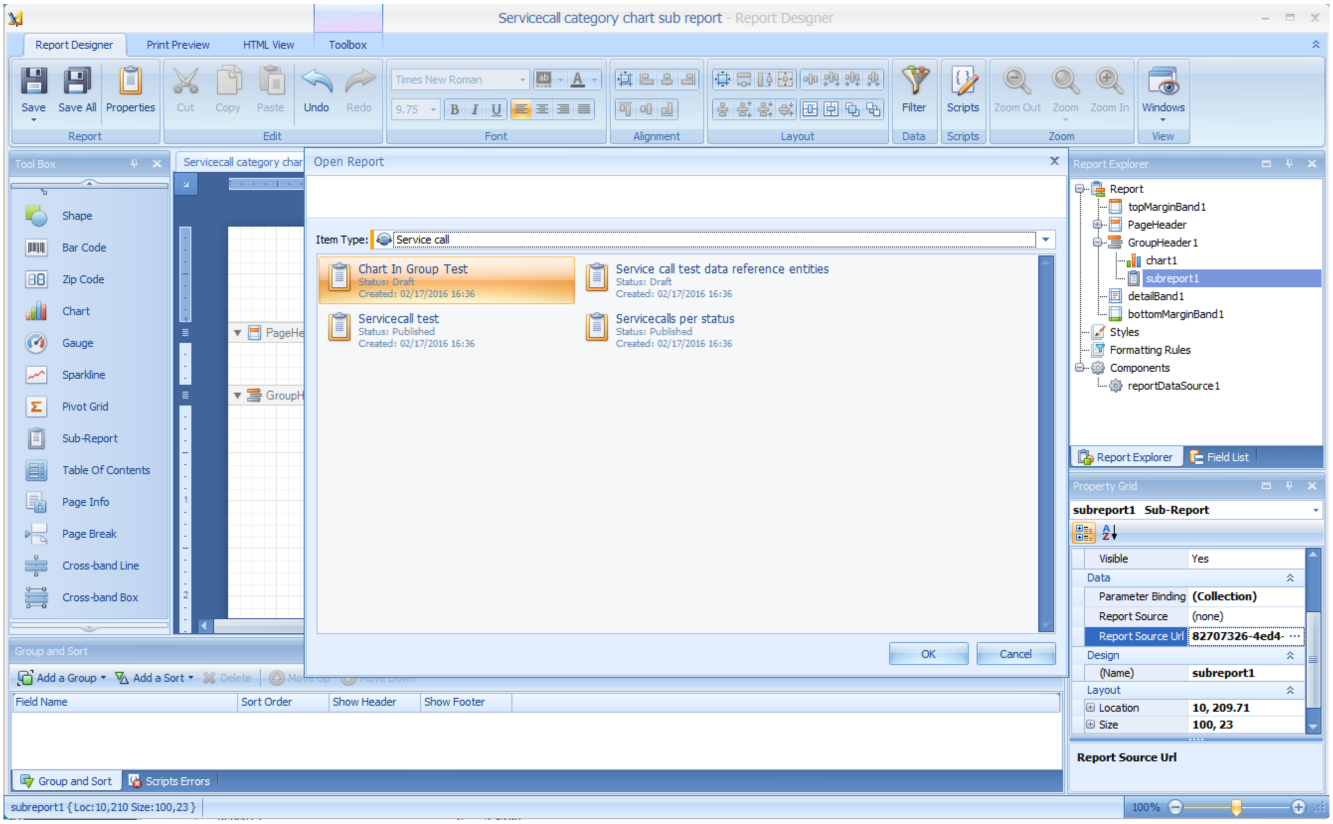
If you now run the report the data in every chart matches the **Category** it belongs to.

6.4.3 Sub Reports

The sub report function can be used to create reports that show information from multiple entities in one report. This function let's you include one or more report(s) in a main report so you can run all reports at once and create one output file.

To include one report in another, open an existing report or create a new one. Then drag and drop the **Sub-Report** item from the toolbox on to the report.

Then go to the **Report Source Url** property of the **Sub-Report** item and click on the list icon at the end of the field to open a dialog where you can choose a report to be included in your report.



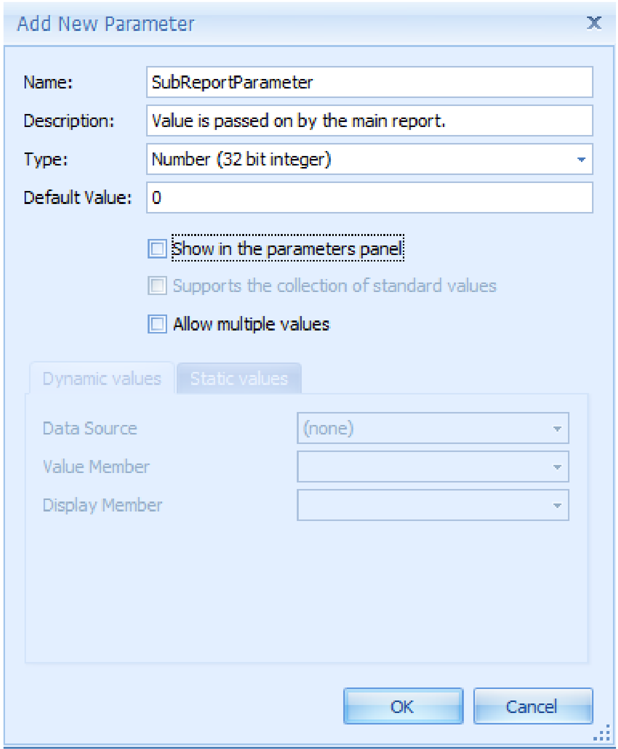
Reports that are linked as sub report can be maintained as a standalone report in the Report Designer but they can also be opened in a separate tab if you double click on the **Sub-Report** item.

6.4.3.1 Pass Parameters to Sub Report

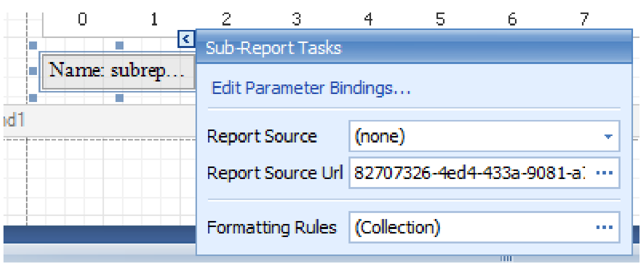
You can pass values to a sub report to filter data based on a report value or parameters that are entered for the main report.

To do this create a parameter in the sub report and make sure to disable **Show in the parameters panel**

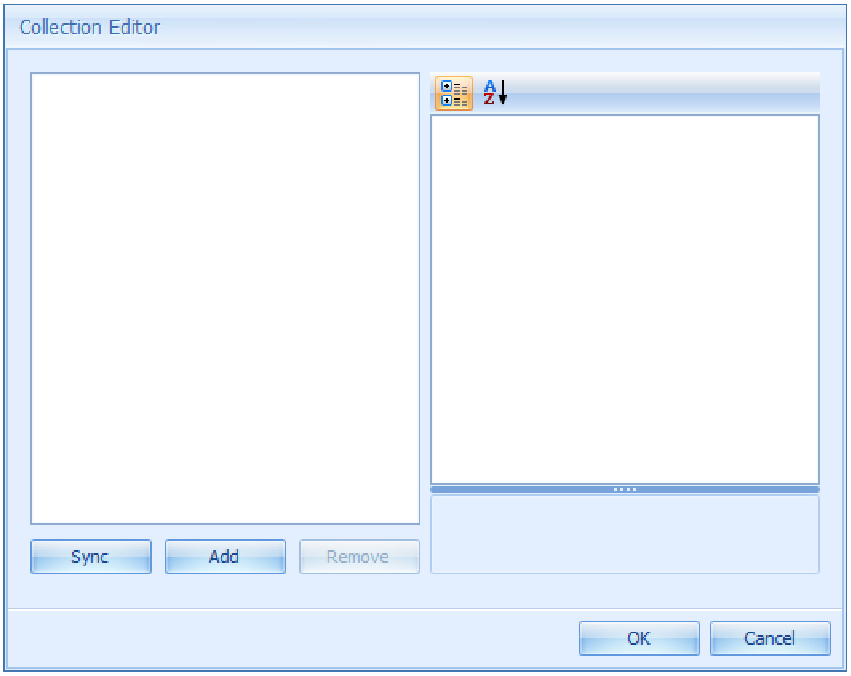
For example:



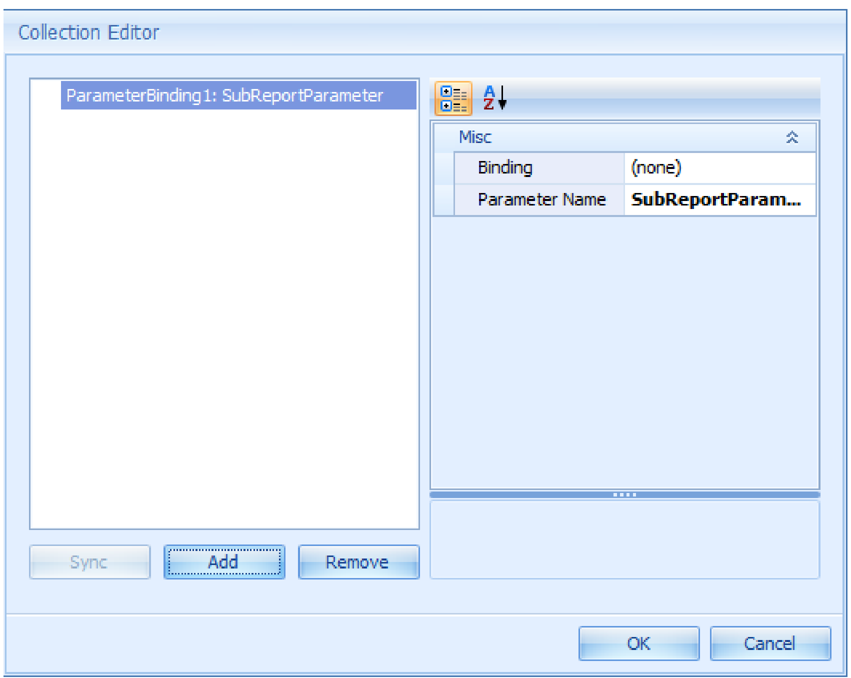
Then in the main report do to the **Sub-Report** item and open the context menu and choose for **Edit Parameter Bindings.**



This opens the following dialog:



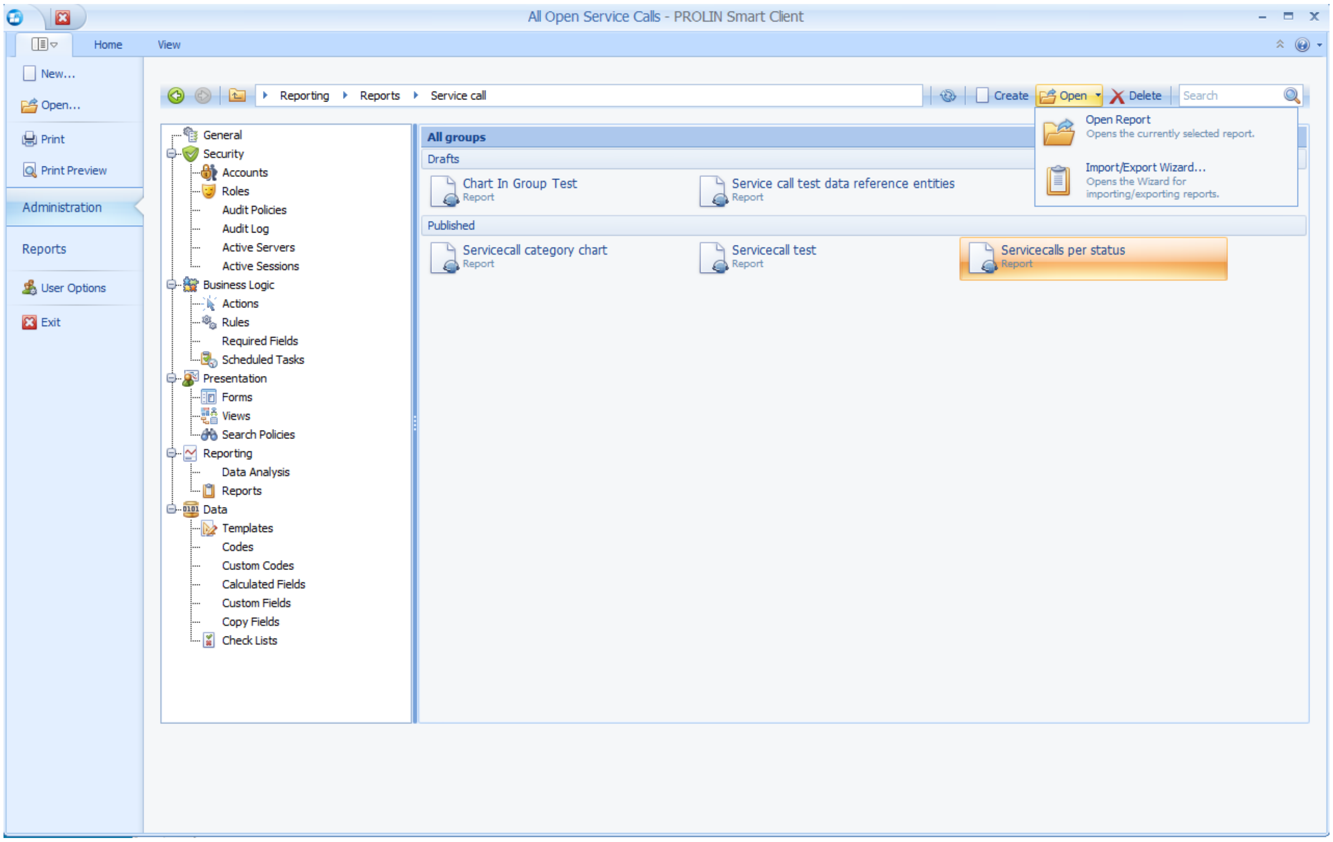
Click on the **Sync** button. Automatically an entry will be made that will contain the parameter from the sub report that you have created before.



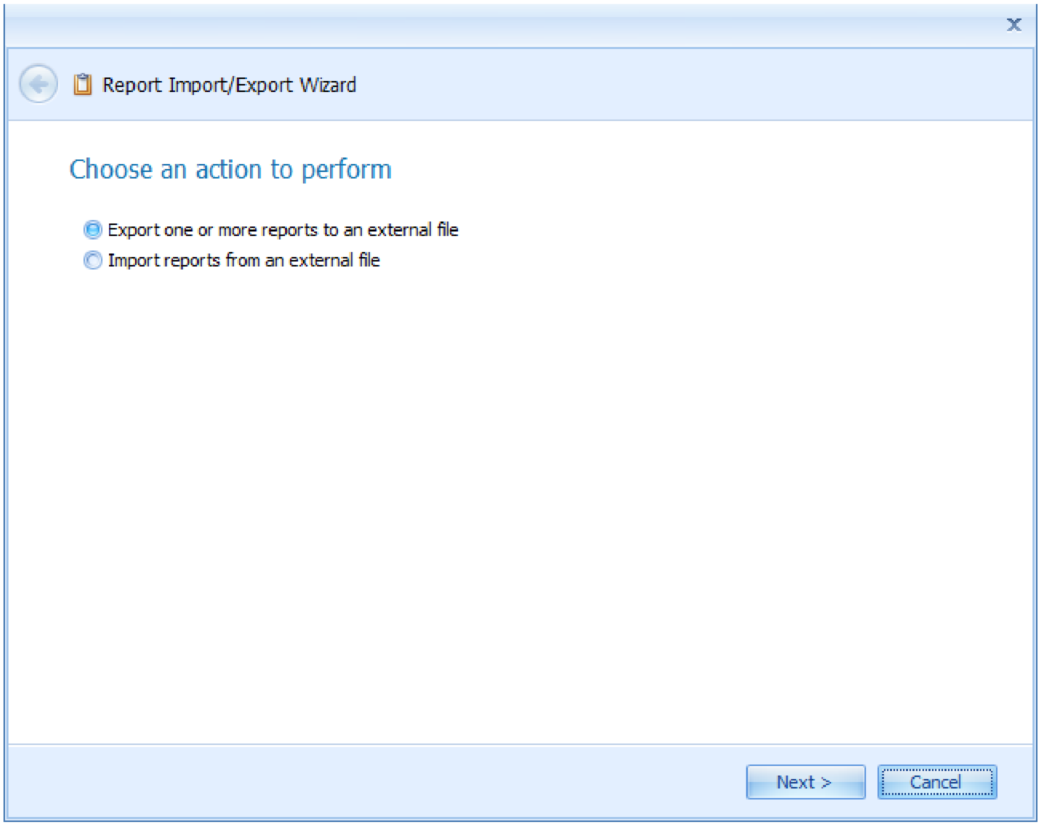
Now select in the **Binding** field which field or parameter's value should be used to pass on to the sub report. Press **OK** and save the report to store the changes.

6.5 Importing/Exporting Reports

Reports can be exported and imported using a wizard that can be found under **Administration - Reporting - Reports - Open**



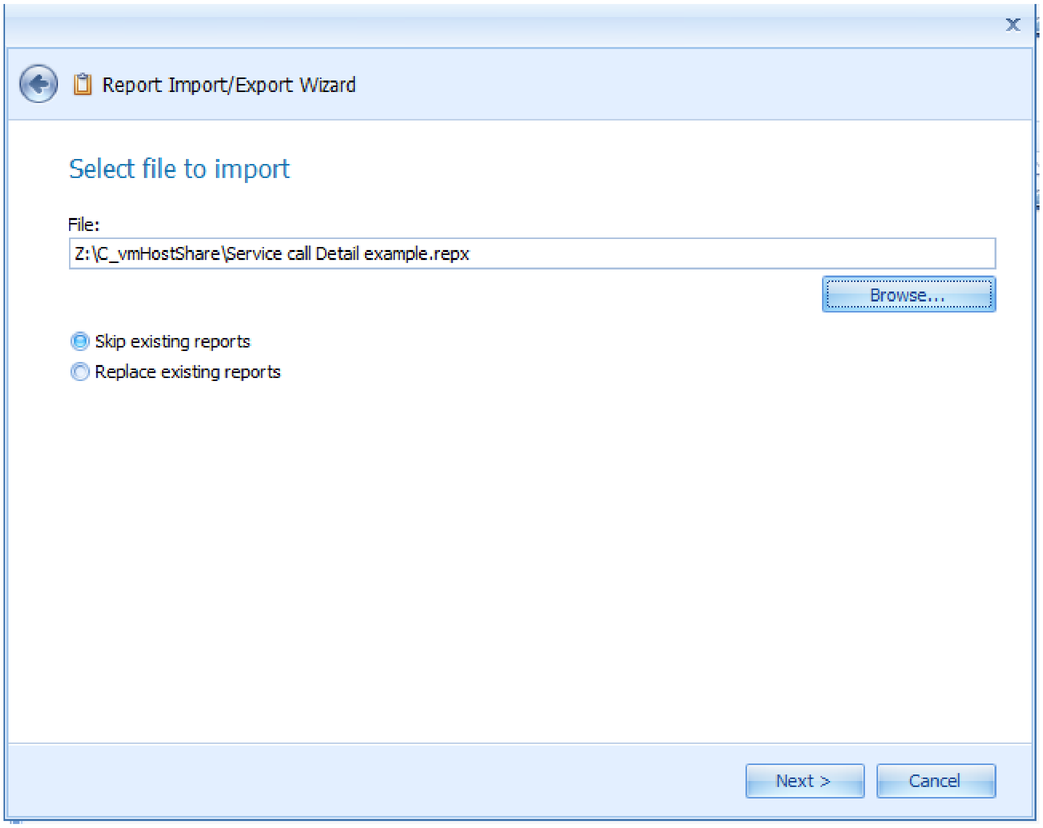
After selecting the menu you will get the following dialog that lets you choose if you want to export or import report(s).



Importing Report(s)

If you choose to import one or more reports you will get the following dialog asking for the location of the file.

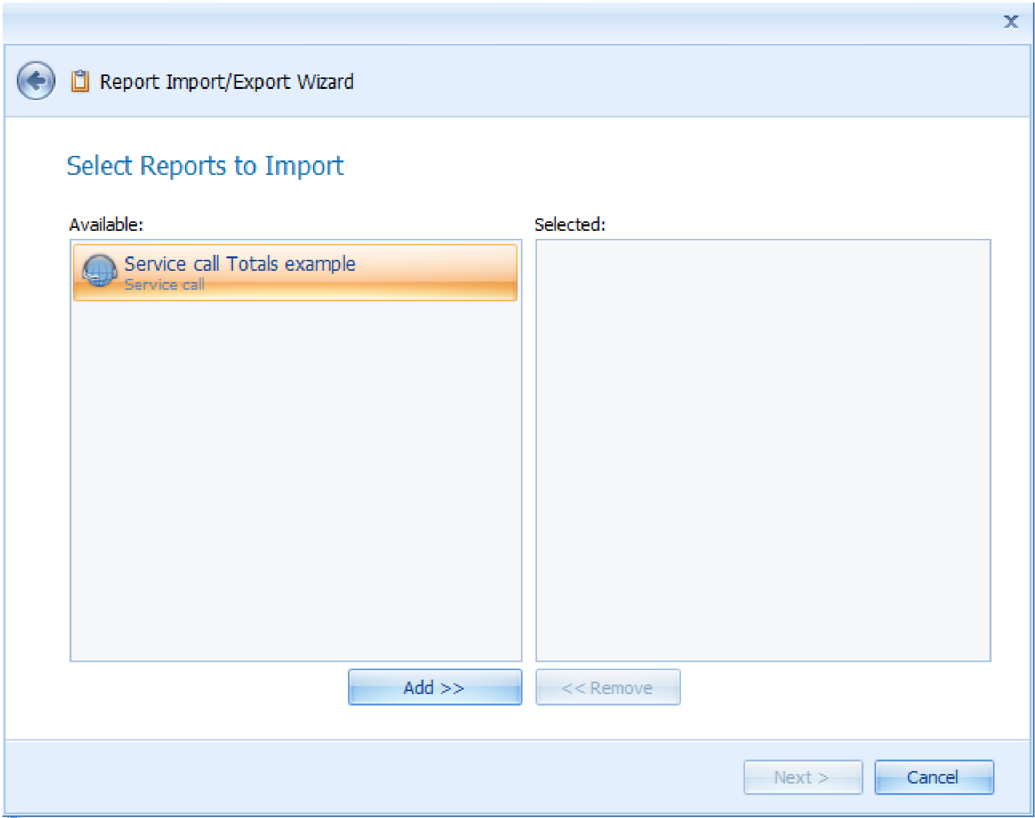
This can be a single report (extension .repx) or a zip file containing more than one reports (extension .repz)



There are two options on how PROLIN Smart Client will act if the reports you try to import already exist:

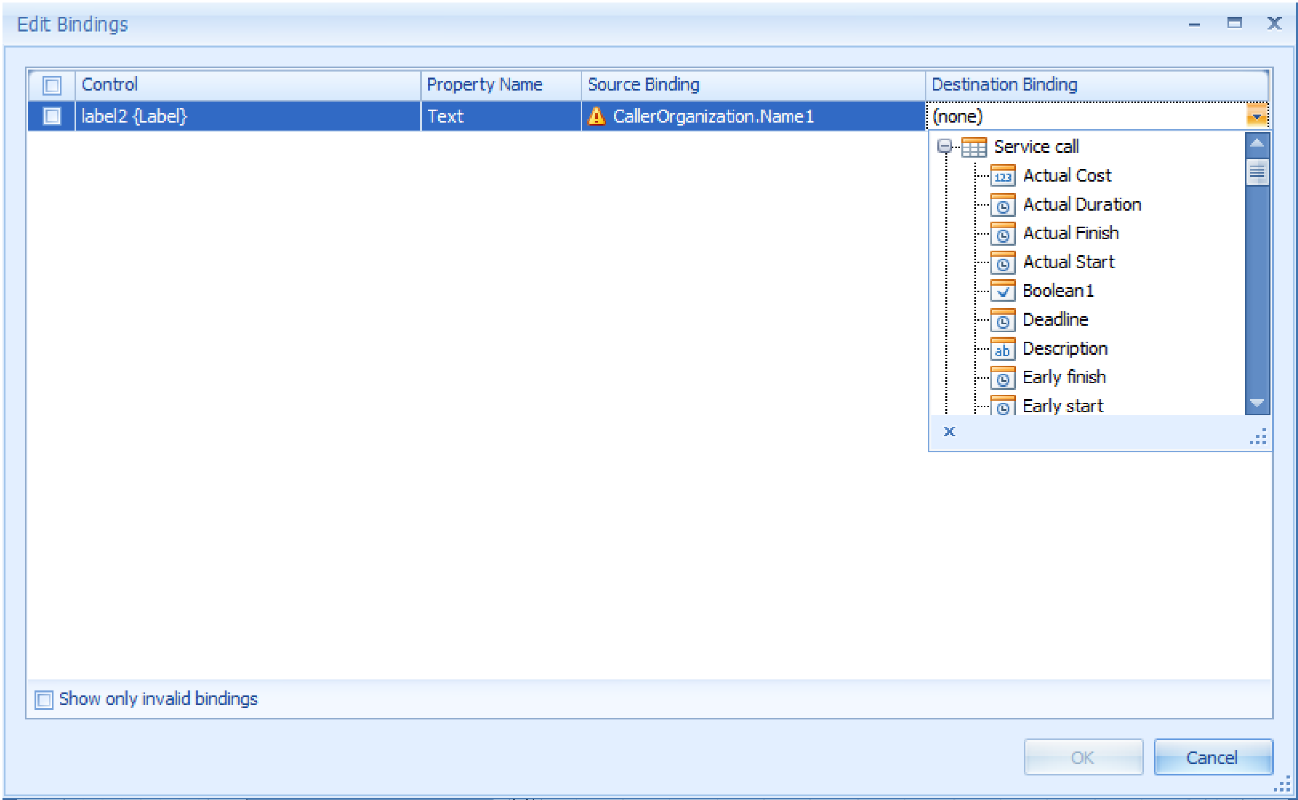
Skip existing report: If the report already exist in the database it will not be imported.
Replace existing reports: Existing reports will be overwritten by the reports you are importing.

After choosing the report file and pressing **Next** the report(s) that exist in that file are shown. You can now select them for import by clicking on the **Add>>** button.



Click **Next** in this and the following screens to import the report(s).

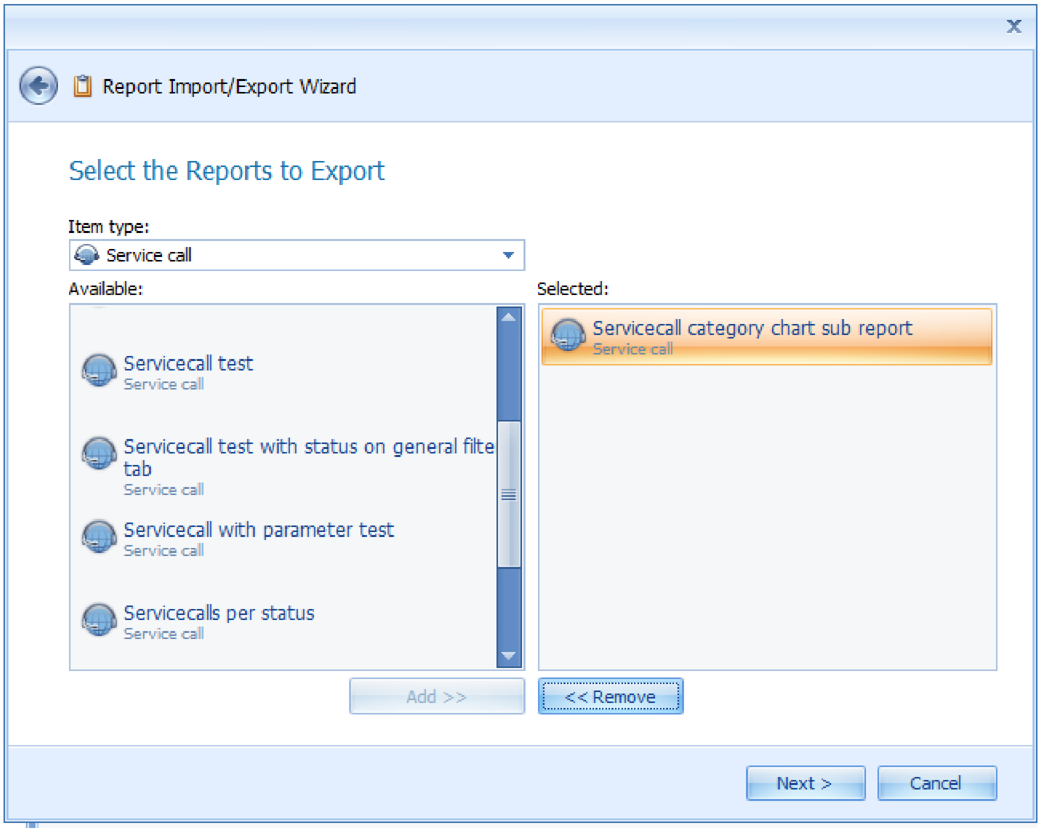
If you open an imported report which has fields that are not existing in the database you import them in you will get a dialog that looks as this:



This shows the field(s) that are not existing and you can choose an alternative destination.

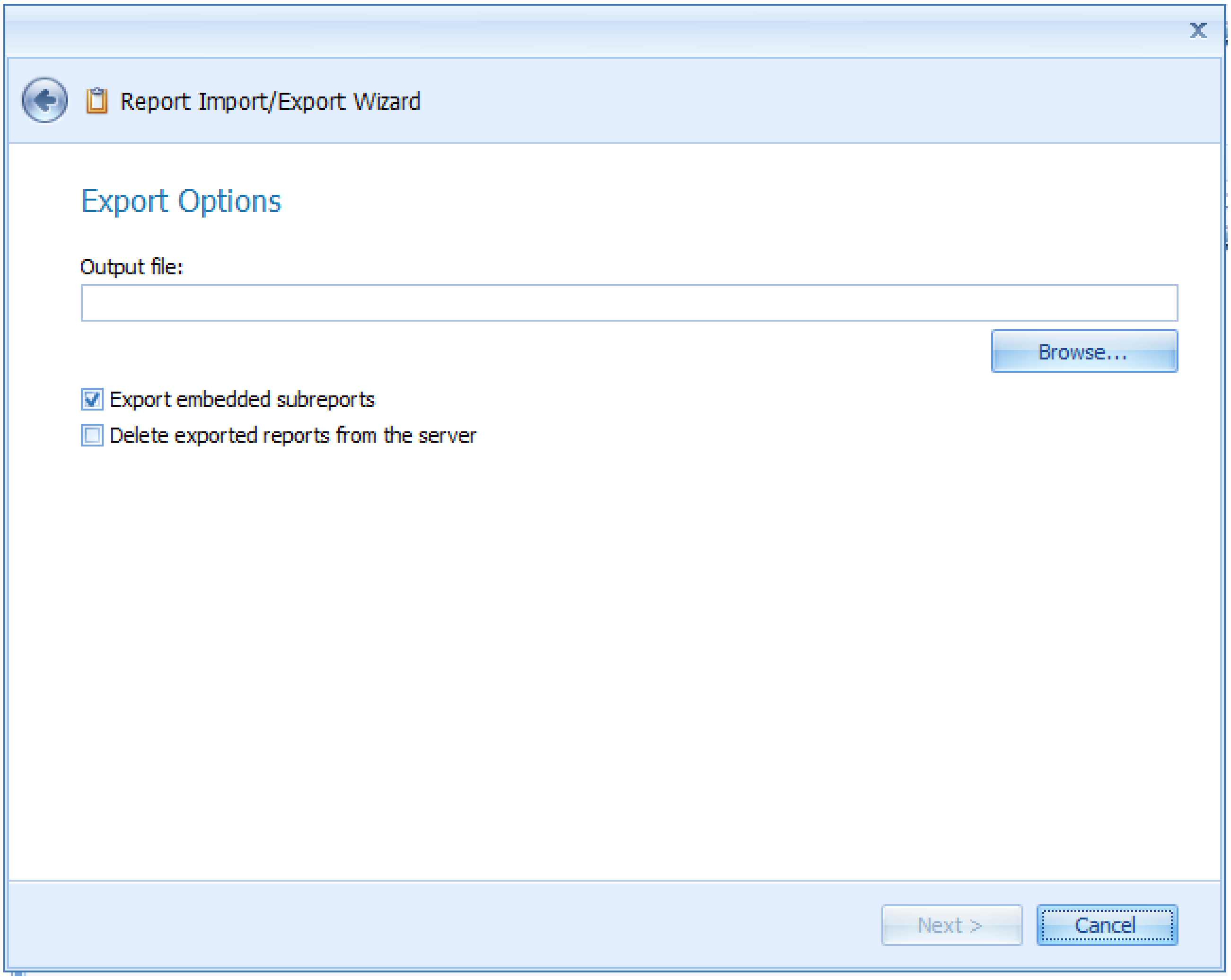
Exporting Report(s)

If you have chosen to export existing reports you will get the following dialog:



You can select per **Item Type** which reports you want to export.

After pressing **Next** you must specify the filename to which the reports will be exported.



You have two options for exporting:

Export embedded subreports: if a report has subreport(s) these will be automatically exported if this option is checked.

Delete exported reports from the server: If this option has been selected the reports that have been exported will be removed from the database.

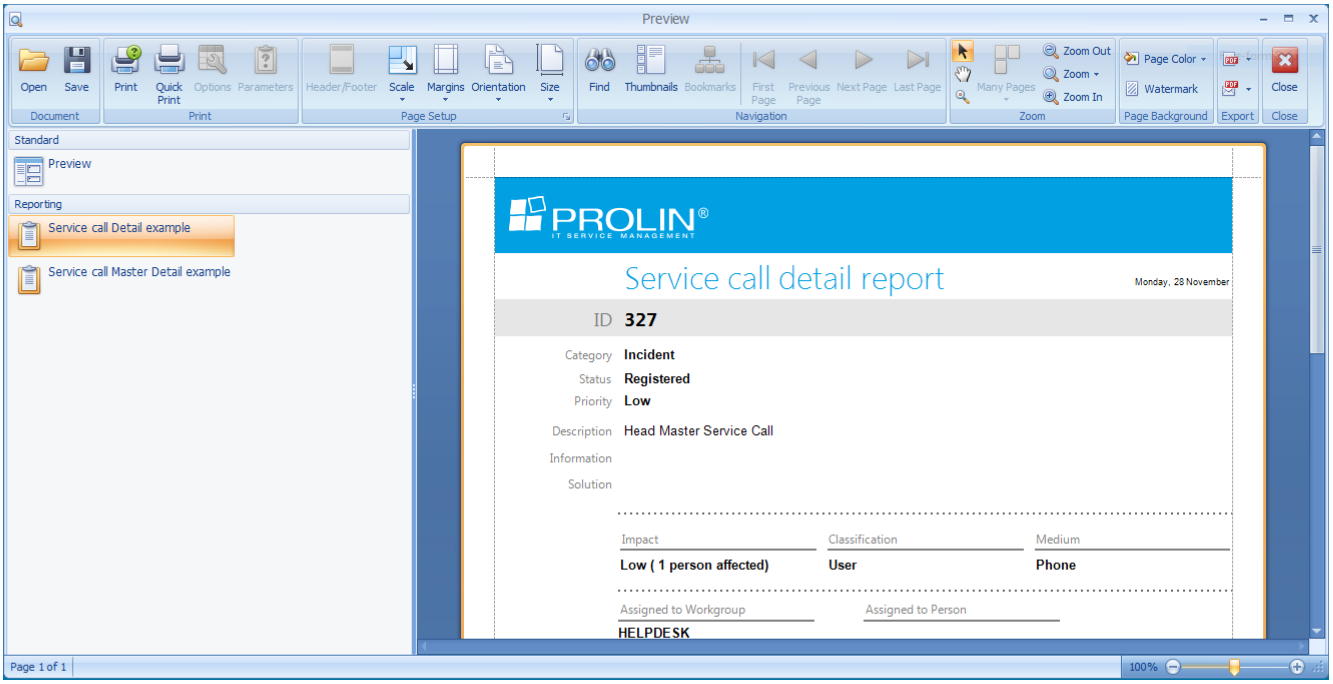
6.6 Starting reports from a Form or View

You can run reports from a Form or View. When you do this the selected record(s) are printed in the report.

To do this you must make the reports you want to use in Forms and Views available by checking the correct location option in the report properties. See Save Reports for more information.

From a form go to **Home** - **Print**, from a view go to **Home - Print** or choose **Print** from the context menu.

You will then get this dialog:



The first option in the left hand panel is the **Preview** function that was used in Smart Client until now in the **Print/Print preview** functions.

Below the Preview option there is a list of available reports. By selecting one of the reports you will see the preview of that report in the right hand panel.

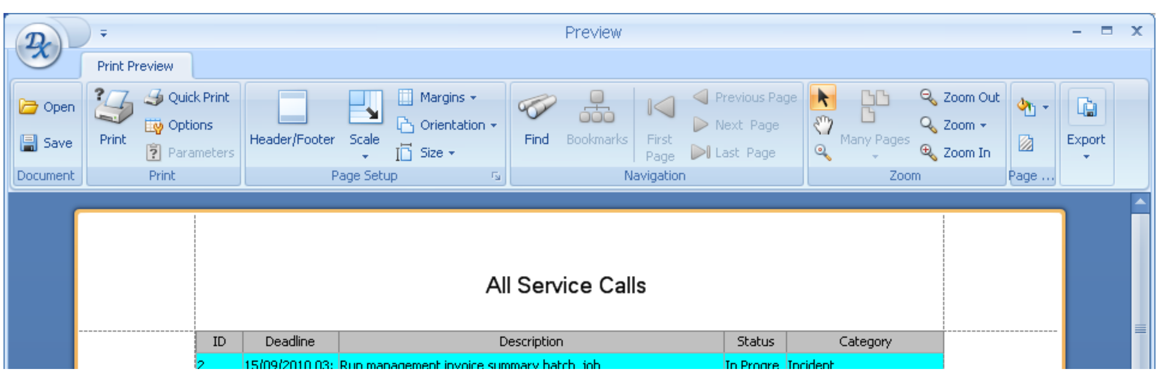
The report will always show the record that you have selected in the form (or the record(s) that you selected in the view). The filter that has been defined in the report is disregarded when the report is called from a form or view.

6.7 Changing the Print Layout

When you print a view or form directly, a default layout and default settings are used. Usually these settings are good. In PROLIN Smart Client you have the flexibility to change the layout of the printed view or form.

To change the layout of a printed view or form, do the following:

1. Open the view and choose **Print Preview** from the Application menu.



Layout options for a printed view or form

2. A **Preview** window is shown.

3. Do any of the following

   · Click **Options** in the window's **Print** group. In the **Print Options** dialog you can choose what you want to print and how you want to print.

   · Click **Scale** in the **Page Setup** group to fit the view or form to the printable page or to resize it larger or smaller.

   · Click **Header/Footer** in the **Page Setup** group to add and edit the header and the footer of the report's pages.

   · Click the **Page Background** command or the **Watermark** command to change the background of the printed view or form.

4. To print the view or form:

   · Click **Print** to open the **Print** dialog. Choose the printer and options and click **Print**.

   · Click **Quick Print** to print to the default printer.

NOTES Notes on the options in the **Print Options** dialog.

If you print a table view

- Select the **Selected Rows** option, in the **Options** tab page, to show only the lines or groups selected in the console's table view to be printed. This option allows to hide some of the lines from a table view.
- Select the **Auto Width** option, in the **Behavior** tab page, to stretch to view to the width of the page. If you clear the **Auto Width** option, the lines in a table view will take the size as they appear in the console's table view.

If you print a chart view

- Select the **None** option (for no resizing) to use the current rendering of the console's chart view. If the current rendering is small, then the resulting report may have a low quality picture.

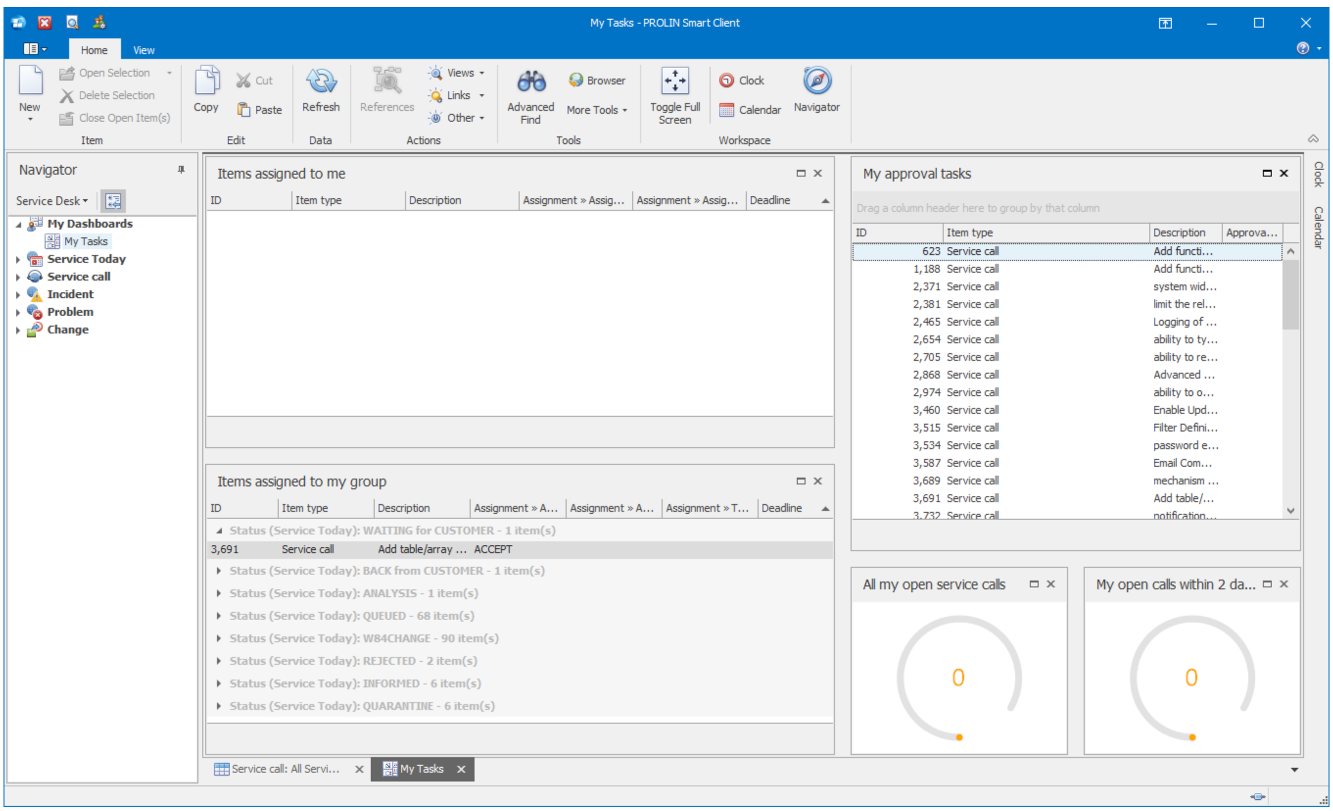
Forms and Scheduler Views have no print options.

7 Doing Daily Tasks

PROLIN Smart Client provides numerous ways to make your daily tasks easy. In this chapter you will learn how to make best use of PROLIN Smart Client technology.

7.1 Working with My Tasks

Starting your day with the My Tasks view puts you in charge of your time. In one look you see the items assigned to you, to your group and the approval tasks waiting for your attention. The My Tasks view is the perfect location to assess your workload of the day.

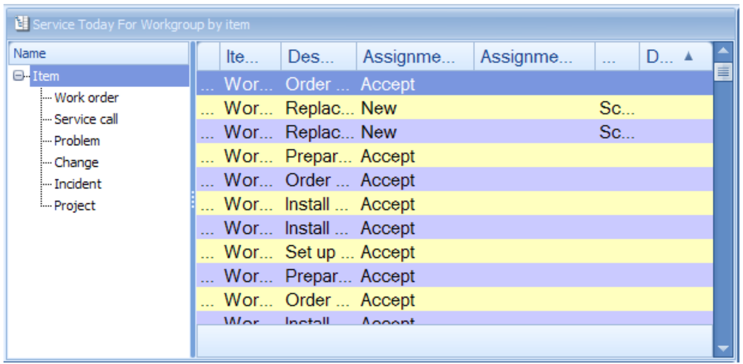


These are suggestions to give you a good start of the day:

- Review the approval tasks assigned to you. Decide whether you can approve to task, have to reject it or must find information before you can make a decision.
- Make a to do list for your day in the **Items assigned to me** view. Depending on the procedures of your organization, you may assign items from your group to yourself. The item will then automatically move from the **Items assigned to my group** view to the **Items assigned to me** view.
- When you manage the assignments list of a group, you may review the **Items assigned to my group** list and assign the items to individual Persons. The items will then be shown in the **Items assigned to me** view of the assigned Person.

7.2 Working with Service Today

Starting your day with Service Today allows you to manage several lists. When you manage the workload of a Workgroup, it may be easier to start in Service Today. When you manage only your own workload, it may be easier to work from the My Tasks view.



Service Today example

Service Today lets you focus on one list of items at the time. The Service Today views show items that can be assigned (Service Calls, Incidents, Problems, Work Orders, Changes and Project) to Persons or Workgroups. Each view can show you the items assigned to the current user of the client (you), to the Workgroup of the current user (your Workgroup) or a selected user or Workgroup.

To determine which assignment is viewed, do the following:

1. Open the table view for which you want to determine the assignment.
2. In the **View** tab, click **All View Options**.
3. In the navigate view of the **View Options** dialog, choose the **Filter** group.
4. In the **More Choices** tab page select the right options.
5. When you want to select a specific user or group that is not you or your group, then clear all options in the More Choices tab page. Turn to the General tab page and select a specific user in the **Assignment>To Person** field or the **Assignment>To Workgroup** field.
6. Click **OK** to close the **View Options** dialog.

See also:

- Working With My Tasks

7.3 Using Advanced Find

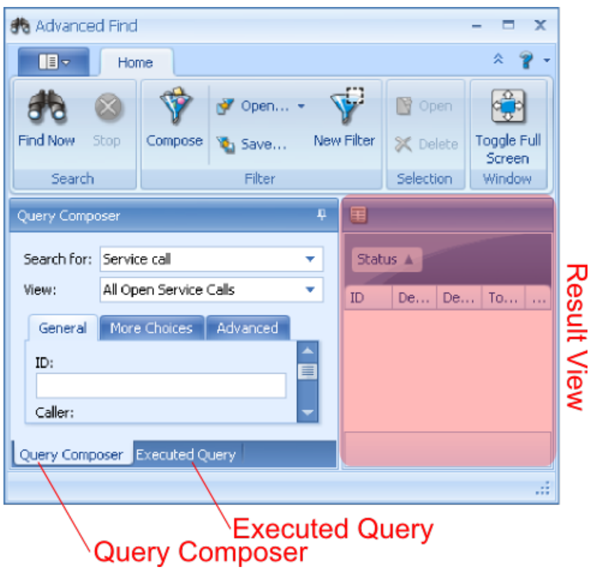
The database you use with PROLIN Smart Client may contain a large amount of information. Easily finding information is important. At any time and at any moment you may want to use Advanced Find.

To use Advanced Find do the following:

1. Click **Advanced** find, in the **Tools** group on the **Home** tab.

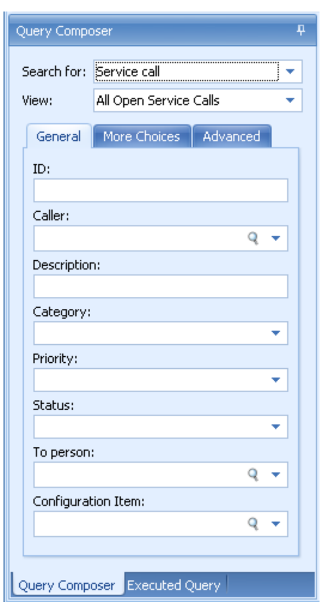
Advanced Find in the Tools command group

2. The advanced find opens with the *Query Composer* open. If the *Query Composer* is not open, click the **Query Composer** tab at the bottom of the dialog or click **Compose** in the **Filter** group.



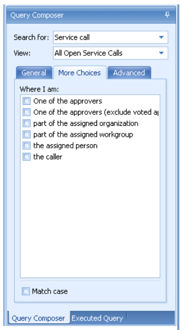
The advanced find dialog

3. In the **Query Composer**, select the item you are looking for in the **Search for** field.
4. Select the view you want to use for the results in the **View** field.

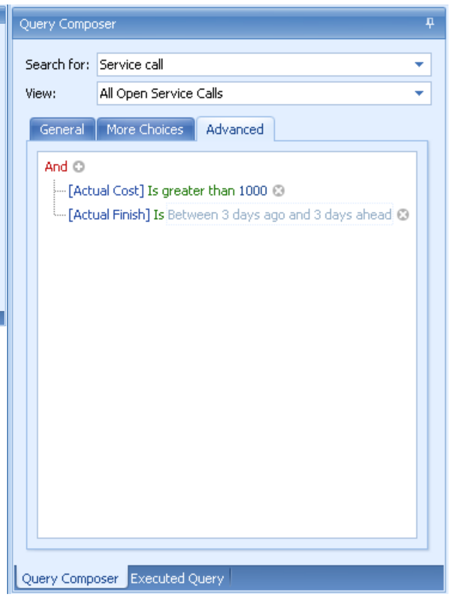


Advanced find composer

5. Now you can enter search criteria
    - In the **General** tab page you can use commonly used search criteria.
    - In the **More Choices** tab page you can use predefined search criteria.
    - For more information about the **Advanced** tab page, see Editing Filters.



More Choices

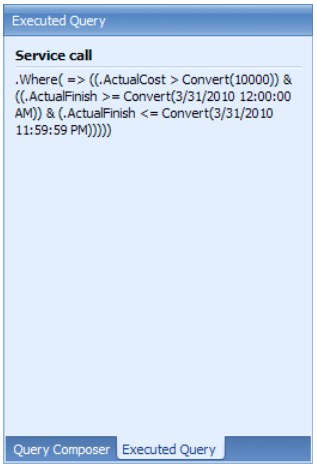


Advanced Settings

6. Once you have selected your search criteria, click **Find Now**. Every time you change the search criteria, click **Find Now** to see the results.
7. A change from your Service Management System is that Advanced Find always uses "contains" to search on a text string if you don't add any search wildcards. If you add wildcards the exact string plus wildcards are used. For example, if you search in the description field on "print" it finds all records that have the word "print" in the description. However if you enter "print*" all records are found where the description starts with "print".
8. The search result is now shown in the result view, the **Query Composer** window can be closed to gain more room for the results.

To clear the currently set conditions, click **New Filter** in the **Filter** group.

For advanced users the **Executed Query** action window shows the used query after you have clicked **Find Now**.



Executed Query

You can save and later re-use an advanced find filter. To save a search filter, click **Save** in the **Filter** group. Navigate to a convenient location and save the filter. To open a search filter, click **Open** in the **Filter** group. Navigate to the location where you store filters select a filter and open the filter. The **Open** menu will show recently opened filters.

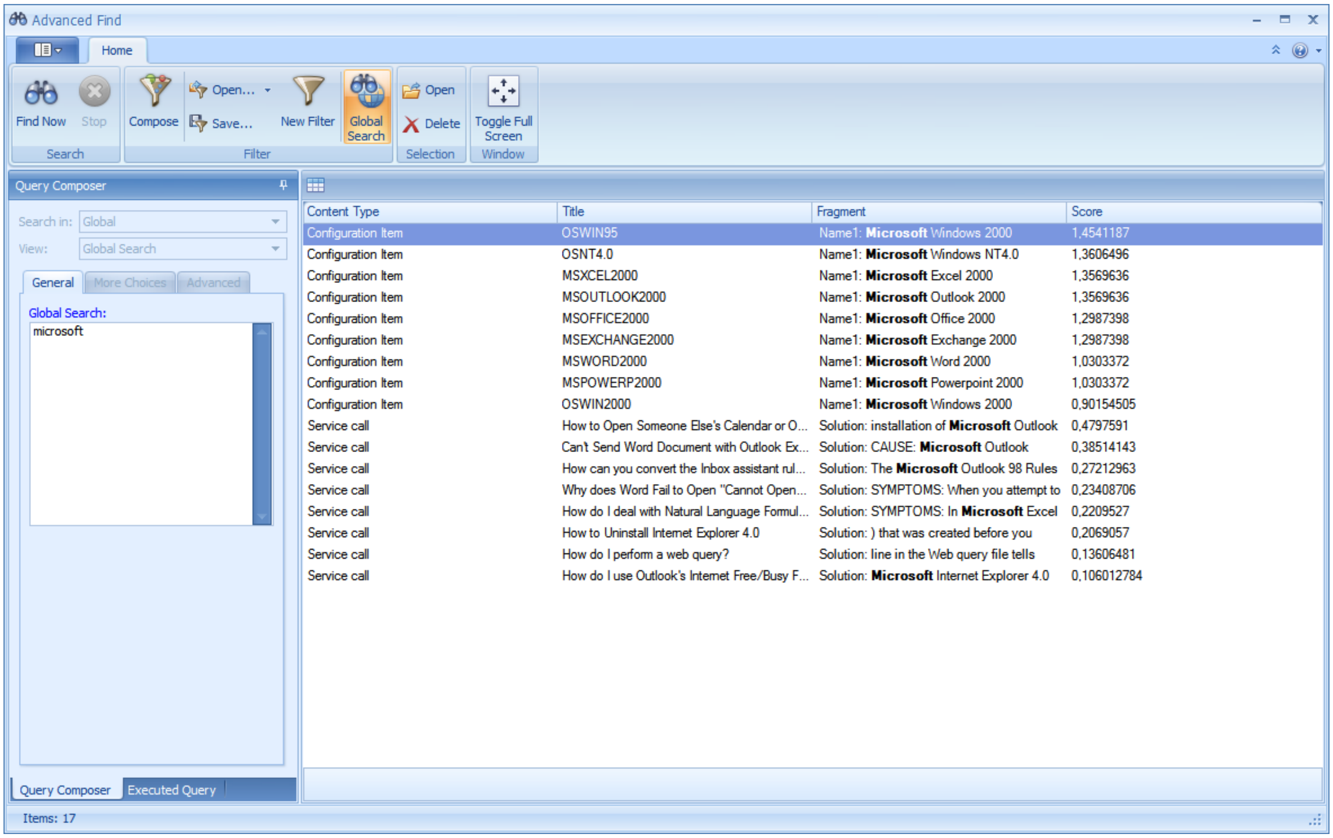
7.3.1 Global Search

The Advanced Find dialog contains an extra button "Global Search" in release 2016 and later. This function searches the database over all entities (Servicecall, Incident, Problem, Change, Workorder, CI).

This function is only available when the PROLIN Power Server Connector is used and when the Search module is active on PROLIN Power Server (which means Elastic Search needs to be installed on a server as well) and one or more types have been indexed, the button will be active. Please check with your administrator if the Global Search button is not enabled.

Clicking on it will activate a text editor in which the user can type search strings. Pressing the "Find Now" button or the F2 key on the keyboard will execute the query.

The only view that is available for Global Search is the "Global Search" view. This view cannot be changed or modified.



Global Search

7.4 Editing Filters

The advanced filtering of PROLIN Smart Client allows complex filters on views, columns of views and in advanced find. Although the technology is the same, there are differences in the various filters.

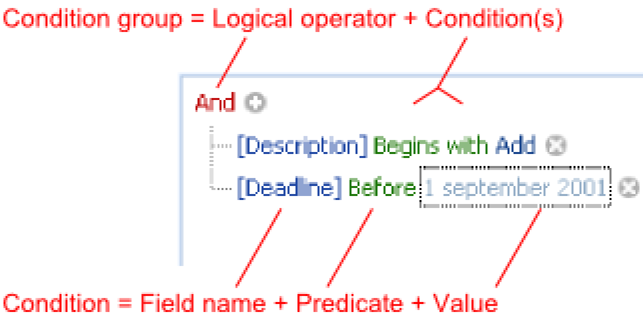
- View filters are part of the view definition and can be changed in the **View Options** dialog. In the view filter you can filter on any field available for the type of item the view is made for.
- View formatting conditions are part of the view definition and can be changed in the **Format Rules** screen of the **View Options** dialog. In the Format Rule you can determine which items in the view are formatted to attract extra attention.
- Column filters apply to the columns in a view and are edited in the **Filter Editor** window. In the column filter you can only change the filter of columns already available in the view.
- Advanced find filters are found on the advanced tab of the **Advanced Find** dialog. Just like the view filter you can filter on any field available for the type of item you are searching.

Although the choice of fields available for filtering is different, editing the filters works the same for all filters.

You can make very complex filters, for very specific results. Simpler search conditions return the results fastest.

7.4.1 Parts of the Filter

A filter consists of one or more condition groups. A condition is a statement about how a field value must contain a certain value. A field must contain an exact value or must contain a described value. One or more conditions are combined in a condition group. If the values of an item meet the condition of the filter, the item is shown in the view.



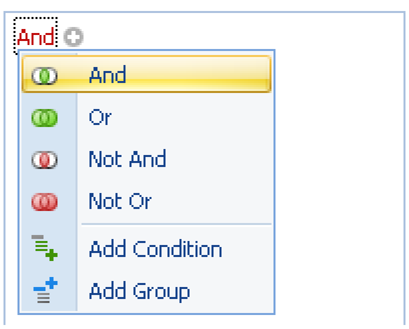
Parts of the filter

The logical operators determine how the conditions are combined to find results. You can nest condition groups. Conditions are evaluated from the deepest nested condition group to the top. First the deeper nested condition group is evaluated, the result is then used to evaluate the next higher condition group.

7.4.2 Editing the Filter

To edit the filter in the **Advanced Filter** of the **View Options** dialog or the **Filter Editor** window, do the following:

1. Click on the logical operator and choose a logical operator from the logical operator menu.



The logical operator menu

And to find results if all conditions in the group are true

Or to find results if one of the conditions in the group are true

Not And to find results if all the conditions in the group are false

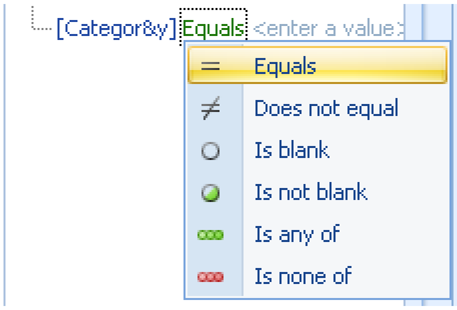
Not Or to find results if all conditions in the group are false or all conditions in the group are true.

Add Condition to add another condition to the group.

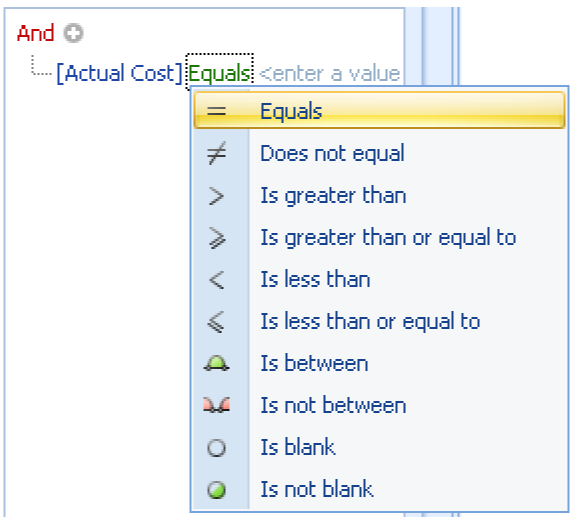
Add Group to add another group within the current group.

2. Click on the bracketed field name and choose a field from the field name list.

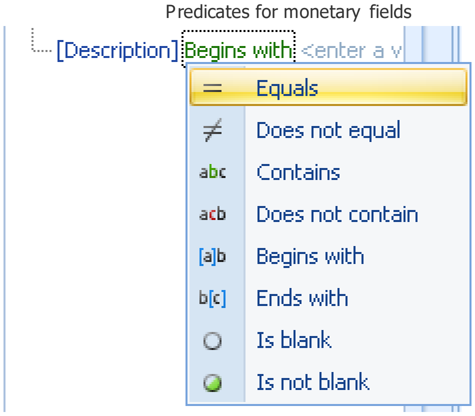
3. Click on the predicate and choose a predicate from the predicate menu. Different types of fields have different sets of predicates.



Predicates for code fields



Predicates for monetary fields

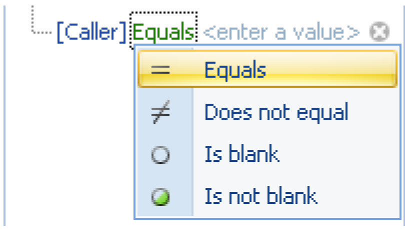


Predicates for string fields

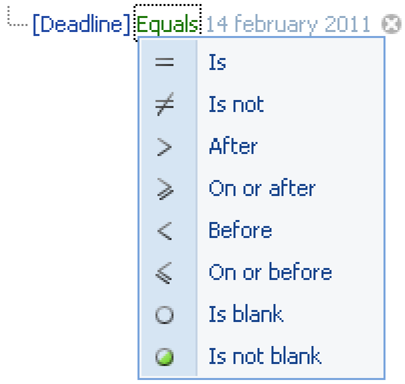
Is any of results in true if the field equals any of the selected values.

Is none of results in true if the field does not equal any of the selected values.

- With hierarchical codes, *Is any of* results in true if the field equals any of the selected values or a value that is a descendent of the selected value.



Predicates for relation fields



Predicates for date fields

Is Blank and *Is not blank* are technically not predicates. *Is blank* will return true if no value is entered in the field, *Is not blank* will return true if any value is entered in the field.

4. Depending on the field name and the predicate you chose, the values must be entered in different ways. Click ***<enter a value>*** and enter a value.
   - Type a value or click the menu arrow to open a selection menu and select a value.
   - For string and text fields, see Searching On Strings.
   - For ID fields, see Searching On IDs.
   - For date fields, see Searching On Date Fields.

7.4.3 Adding Groups and Conditions

To add a new condition group click on the operator and choose **Add Group** to insert a new condition group below the current group.

To add a condition to a group click on the operator and choose **Add Condition** or click the plus button right from the condition.

7.4.4 Searching on Strings

To search on strings and text fields, you type part of the text you are looking for. Depending on the predicate in the filter, PROLIN Smart Client will search for the given text begin, end or anywhere in the text field.

You can also use wildcards in the search text. Two wildcards can be used, the percent (%) and the asterisk (*). Percent and asterisk work the same, they function as placeholders of one or more characters. For example, the search string 'PERF*op' will result in values that start with 'PERF' and that end with 'op' and that have any length of characters in between.

7.4.5 Searching on IDs

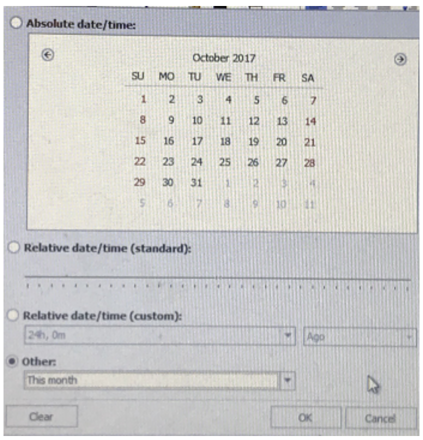
To find items on their ID in Advanced Find in the **General** tab or the **Advanced** tab, enter one of the following in the **ID** field.

- Type a single ID.
  Example: 120. This example will retrieve the item with ID 120.

- Type a range of IDs.
  Example: 100-110. This example will retrieve all items with an ID in the range between 100 and 110.
- Type any combination of single IDs and ranges of IDs, separated by semi-colons..
  Example: 100-110;120;130-135;203. This example will retrieve all items with an ID in the range between 100 and 110 or with the ID 120 or with an ID in the range between 130 and 135 or with ID 203.

7.4.6 Searching on Date Fields

To find items on date field values in Advanced Find in the **General** tab or the **Advanced** tab, click in the date value field to open the date selection window. The date selection window appears above or below the field:



Create a date selection as follows:

- To select a specific date, click **Absolute** and select a date. Change month by clicking the triangle arrows. Change the year by clicking on the year and then clicking the triangle arrows.
- To select a range of dates, click **Absolute** and click on the starting date then drag the mouse to the end date of the range.
- To select a relative date, click **Relative**. When you have chosen the predicate **After**, **On or after**, **Before** or **On or before**, then the slider will be solid. When you want a date that is equal or that is not-equal to a date in a field, then the slider is split.
  - With a solid slider, drag the slider left or right. A tool tip will show the selected value.
  - With a split slider, first drag one side of the slider and then drag the other side of the slider to the right date. While you drag each side of the slider the text in the date field is updated. Stop when the correct description is shown. Example, "2 months ahead."
- To select a relative date range, click **Relative**. First drag one side of the slider and then drag the other side of the slider to the right dates. While you drag each side of the slider, the text in the date field is updated. Stop when the right description is shown. Example: "Between 2 weeks ago and 2 weeks ahead."
- To select another descriptive date, click **Other** and choose one of the options. Example: "Last week."

7.5 Using Shortcut Keys

General Shortcut Keys

Alt + **F4**	Exit the application
Alt + SPACE	Open the console's system menu. From the console's system menu, you can restore, move, resize, minimize, maximize, or close the console

Navigating The Console

Alt or **F10**	Pressing Alt or F10 when working in the console cycles between the toolbar and the windows in the console.
Toolbars	If the toolbars are selected, labels will be shown press any of the keys as shown in the labels will start that command. For example, try the following sequences: • **Alt** - **E** will exit the application. • **Alt** - **H** - **O** opens the User Options dialog. • **Alt** - **H** - **N** - **A** pins down or closes the navigator window. In the ribbon the arrow keys allow to move from one command to the other, press **Enter** to activate the command.
Windows	In the windows, the **DOWN ARROW** or **UP ARROW** key makes clear which window is selected. **DOWN ARROW** moves to the window to the right of the previous selected window, the **UP ARROW** moves to the left of the previous selected window. The **Tab** key will move selection to different parts of the window. In the My Task window, if the double V icon is selected then **Numeric Key +** will expand the window and **Numeric Key -** will collapse the window.

Navigating Trees

Numeric Key +	Expands the current selection
Numeric Key -	Collapses the current selection
RIGHT ARROW	Expands the current selection if it was not already expanded, otherwise goes to the first child
LEFT ARROW	Collapses the current selection if it was not already collapsed, otherwise goes to the parent.

Table View

ARROW UP	Move to the item line above the currently selected item line.

ARROW DOWN	Move to the item line below the currently selected item line.
Enter	Open the form for the currently selected item.

Chart View

Alt or **F10**	The sequence **Alt** + **V** + **C** will open up a menu with chart type. Use the arrow keys to select an chart type, then press **Enter** to show the chart.

Explorer View

Tab	Cycles throught the views in the explorer view. **Shift** + **Tab** cycles through the windows in the reverse direction.

Form

Alt or **F10**	Cycle between toolbars and form pages. The sequence **Alt** - **A** - **C** will close the form.
Tab	Move to next field on page. If the last field is reached, focus moves to the first field on the page. If the last field of the main page is reached, focus moves to the tab of the first tab page.
Shift + **Tab**	Move to previous field on page. If first field is reached then focus is moved to last field on page. If first field of a tab page is reached the focus moves to the tab of the tab page.
ARROW RIGHT	If the tab page label is selected, move to next tab page.
ARROW LEFT	If the tab page label is selected, move to previous tab page.

8 Working With Items

Information in PROLIN Smart Client is held in items. There are a large number of items in PROLIN Smart Client, for example Service Calls, Work Orders, Incidents and Changes. Each item contains information that is used in a process. To properly support the process, the item also behaves in specific ways. For example, fields may be required or actions are started. With the standard configuration, PROLIN Smart Client is ITIL compliant. The configuration may be changed to (also) adhere to company processes and procedures.

You will learn how to use basic behavior shared by all items in this chapter. Some items are closely related, for example Service Calls and Incidents. Closely related items share much of their behavior. This chapter however, explains the behavior shared by most items.

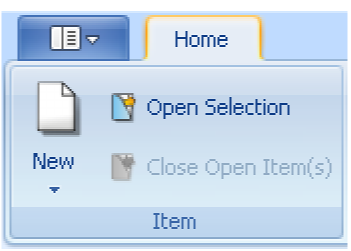
8.1 Creating an Item

There are different ways to create an item. One approach may give you more control over the creation process than the other. One approach may be more applicable for one situation than the other. The following is an overview.

New

To create an item with all default settings and with a default form, do the following:

1. Navigate to the item view for which you want to make a new item.
2. In the **Item** group on the **Home** tab, click **New**. The new item is now shown in the default form and contains values as defined in the default template.

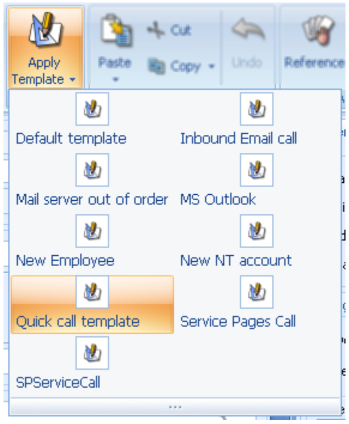


The Item Action Group

Alternatively, to create a new item with all default settings, right click in the item's view and choose **New** from the pop-up menu.

NOTE: In views that can show multiple items, such as the *My Tasks* view, a dialog will appear in which you must choose a specific item to create.

3. To apply additional values from another template, choose a template from the **Apply Template** menu in the **Template** action group. The currently applied template is highlighted in the menu.

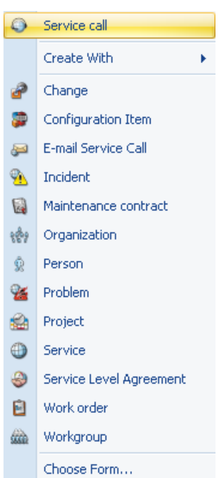


Apply a template on a new item

After you save the item, you cannot change the chosen template anymore. The next time you open the template, the button in the **Templates** group will be grayed out and the button's label will show the first applied template.

First template applied

NOTE You can create a new item with default settings and the default form from any view. In the view, select the item you want to create from the **New** menu.



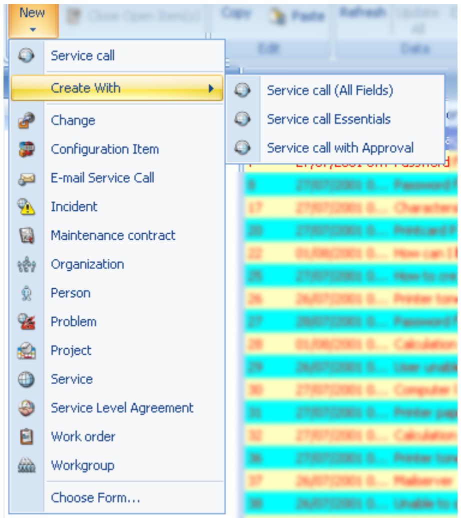
The New Menu

Choose a Form to Create an Item

To create an item in the form of your choice, do the following:

1. Navigate to the item view for which you want to make a new item.

2. Open the **New** menu and point to **Create With**.



Choose a form to create an item

3. Choose the form you want to use to create the new item.

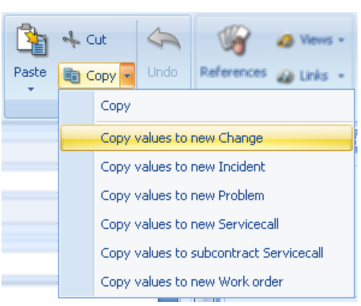
See also:

[Set the Default Form]

Copy Information to a New Item

Service Calls, Incidents, Work Orders, Changes and Problems contain similar information. The information similar in these items can be used to create a new item. When the new item is of the same type as the item you are working with, more information is copied than when the new item is of another type. The information copied to the new item cannot be changed. Not all copy directions are available, the copy methods available roughly follow common ITIL process flows.

To create an item from copied information, open the item from which you want to copy. In the copy menu, choose the item you want to create. The following image shows the copy menu from a Service Call form.



Choose the item to create with copied information

8.2 Creating Multiple Configuration Items at Once

The Generate CI Wizard allows you to create multiple Configuration Items at once. Some planning is useful before you start the wizard. Make sure that you have or know the following.

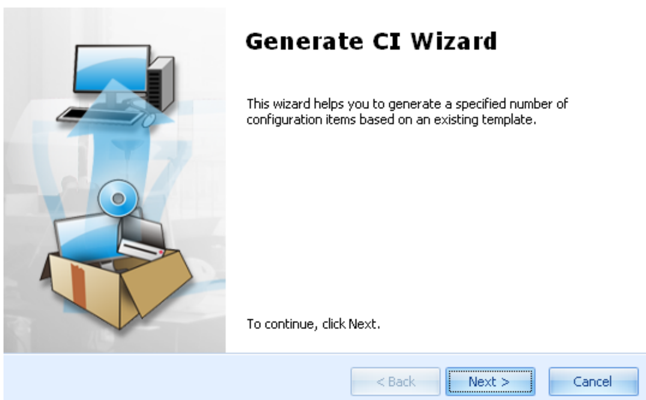
The total number of Configuration Items to be created . The wizard will create the given number of configuration items. Once started you cannot cancel it, if you use a number that turns out incorrect, you will loose time with creating, deleting and re-creating configuration items.

The template contains the right information . The template you use to create the configuration items contains all the information that will be in the newly created configuration items. You can change the information in the process, but the time you execute the wizard may not be the handiest time to check the template. Make sure you use the right template and the template contains the right information before you start the CI wizard.

To start the CI Wizard, choose **Generate CI Wizard** from the **More Tools** menu in the **Tools** group.

Generate CI Wizard in the Tools group

1. The Generate CI Wizard opening screen appears, read and click **Next**.



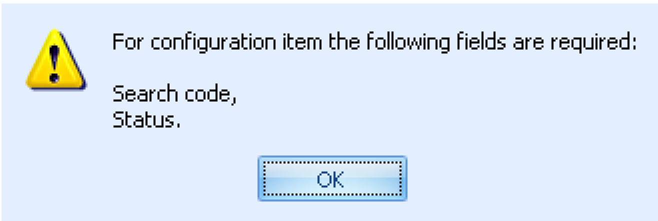
CI Wizard opening screen

2. In the **Total Numbers and Template** screen, enter the number of Configuration Items you wish to make in the **How many configuration items do you want to generate?** field.

Enter total number of items and template

Select the template from the template list. Some templates need information specific for use in the wizard. For example, the location of the configuration item may have to be set each time you use the wizard. To enter this information click **Modify Fields**. A form is now shown in which you can modify field values. The modified field values are not stored in the template and are only used for the current use of the wizard. After you modified the needed information, click **Save and Close** in the **Modify Fields** form.

After setting the total number and template, click **Next**. If the template does not contain required information, a warning is shown. Read the warning, close it and modify the fields mentioned in the warning as described above. Alternatively you may choose another template that contains the correct information.

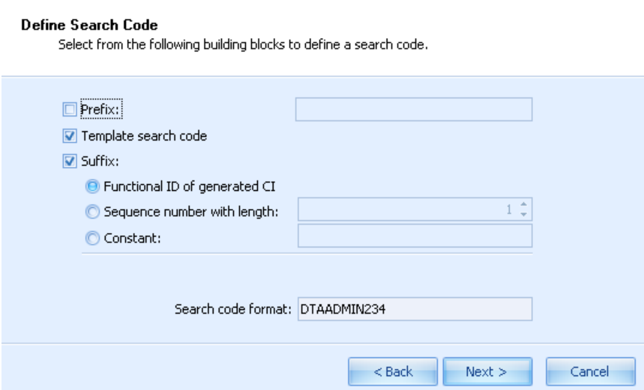


The mentioned fields need a value

3. In the **Define Search Code** screen, determine what the search code will look like.

   When you create non-unique items, you may want to allow variation in the search code. Choose the **Functional ID of Generated CI** option to create suffixes that end in the functional ID. Choose **Sequence number with length**, to generate a suffix that starts at 1 for each use of the wizard. If you choose to use a sequence number, enter the length of the sequence number in the length field. The length of the sequence number must be enough to contain the number specified as total number in the **Total numbers and template** screen. The sequence number will be filled with zeros to the left to create the length of the suffix. For example, a sequence number with a length of three will contain "001" to "999"

   Make sure the search code complies to company standards. In the **Search code format** field you will see an example of the search code using your settings.

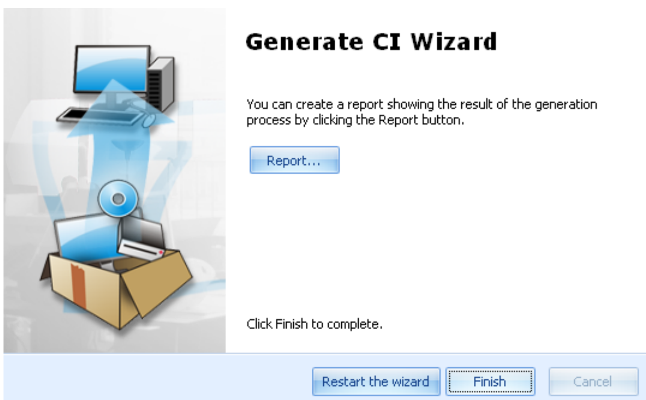


Define the search code

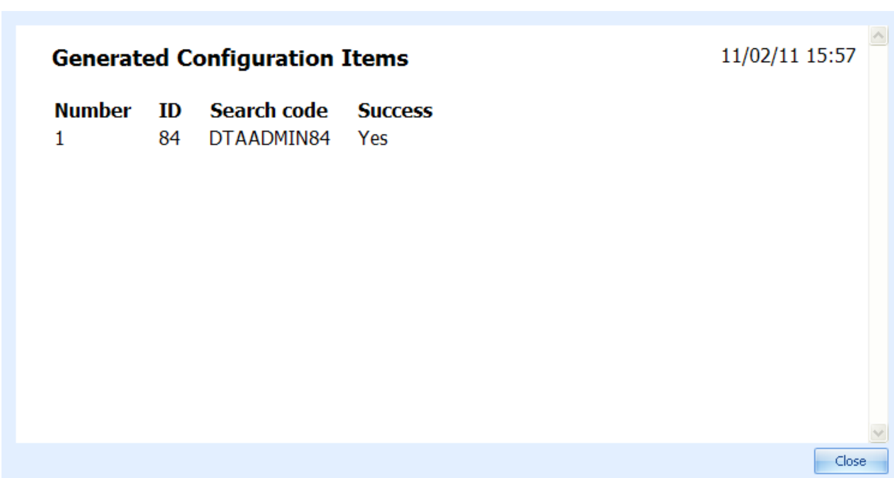
4. You are now about to generate CIs, check the number of CIs that will be generated. When the number surprises you or you feel unsure, click **Back** to review the settings. Click **Next**, the CIs will be generated. You will not be able to stop the process. Depending on the total numbers to generate, generation of CIs may take considerable time to complete. A progress bar will appear to show progress.

Ready to generate CIs

5. After the CIs are generated, you may want to generate a report. Click **Report** to view and maybe print the report. Click **Restart the wizard** to start with the first screen and generate more CIs. Click **Finish** to close the wizard.



CIs generated



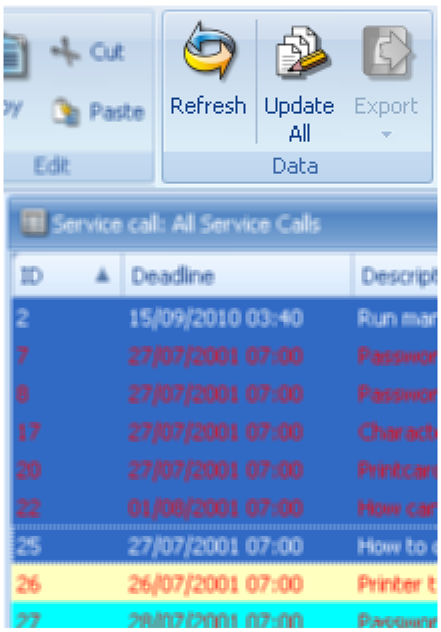
CI Wizard report

8.3 Updating Multiple Items at Once

To update – edit – an item you open a form and change the field values in the form. See Opening An Item In A Form.

When you need to update multiple items, opening forms and applying the same change in each item will be cumbersome. PROLIN Smart Client has the *Update All* function that helps you apply the same change to a selection of items.

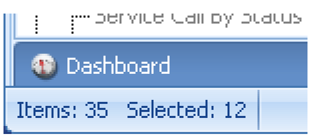
When you select more than one item in a view, **Update All** becomes available. *Update All* is not available in the *My Tasks* view.



Update all is available

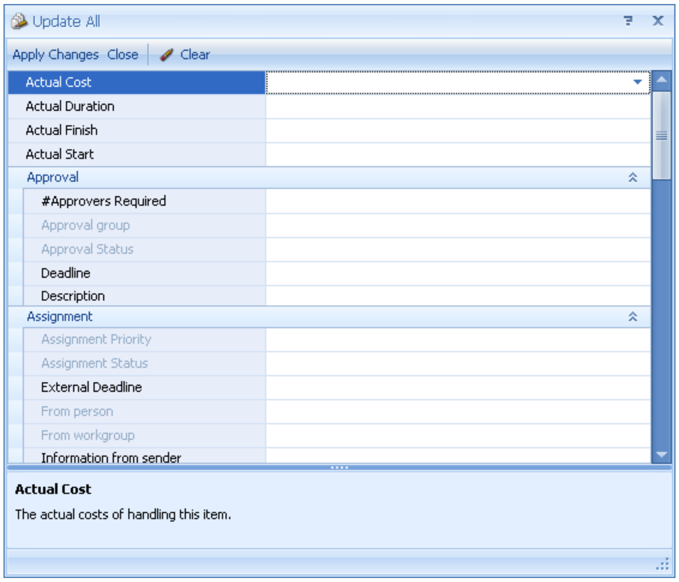
To update selected items, do the following:

1. Select multiple items. The lower left hand corner will show the number of items selected.



Number of items in view and number of items in selection

2. Click **Update All** in the **Data** group. Alternatively, you may right click in the selection and choose **Update All** in the pop-up menu. The **Update All** dialog appears.



Update all dialog

3. The **Update All** dialog shows all fields of the item that can be changed through *Update All*. Modify the field values. To clear all field value changes you made, click **Clear**. The values you enter in the fields ***replace*** the values currently stored in the selected items.

4. After you entered the needed field values, click **Apply Changes**. To close the dialog, click **Close**.

8.4 Deleting an Item

Deleting an item is a normal part of an item's life cycle. You may want to delete an item because the item is no longer in use. However, company policies may require that you do not delete items. The Service Desk contains archiving functions that remove items from the database according to set policies.

You can delete an item only if you are authorized to delete that type of item. If you are not allowed to delete items, the delete function is not available to you.

An item can only be deleted if the item does not have a relation with items that depend on the item you are about to delete. For example, many items have history lines. History lines that are not related to an item in the database have no purpose. When an item still has reference to history lines, you cannot delete the item. When a database contains history lines that are not related to the item they describe, the database has lost its integrity. To avoid a database with impaired integrity, items with existing references cannot be easily deleted.

Some items, such as Person, can be blocked. Blocking is an alternative to deleting. A blocked Person cannot be selected anymore in Lookup fields. For users of the system it seems as if a blocked item is deleted, however the item is still in the database and existing items can still refer to blocked items.

When you want to delete an item, do the following:

1. Select the item you want to delete. You cannot delete multiple items at once.

2. Right click on the selected item and choose **Delete** from the popup menu.

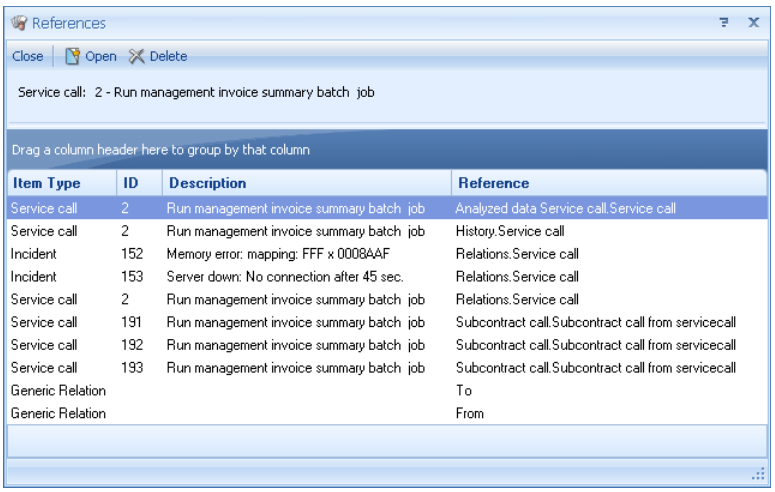
The delete function may not be available to you.

To delete an item with references, do the following:

1. Select the item you want to delete.
2. Click **References** in the **Action** group in the **Home** tab. The **References** dialog appears.

References in the Actions group

3. The references dialog shows all references the current item has. Review details of the reference, select the reference in the reference list and click **Open**.



References of a specific Service Call

4. When you agree that the current item and all listed related items can be deleted, click **Delete**. The delete function may not be available to you.

8.5 Sending E-Mail Messages from Items

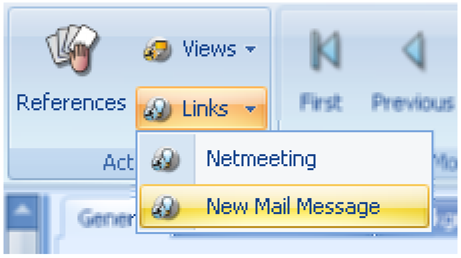
E-Mail messages can be sent from many items using a smart link. The Smart Links can be found in the **Actions** group in the **Home** tab. The e-mail smart link must be made available by the system administrator.

The most common use of e-mail from PROLIN Smart Client is to communicate with a caller or with a Person who has a Work Order assigned. The information contained in the created e-mail message depends on the configuration of the system.

To send an e-mail message, do the following:

1. Select an item a view or open an item from a view.

2. From the **Links** menu in **Actions** group, choose **New Mail Message**. The name of the Smart Link may vary due to configuration differences.



Send a New Mail Message

NOTE : The Netmeeting Smart Link works similar to sending e-mail messages. Availability depends on configuration of the system.

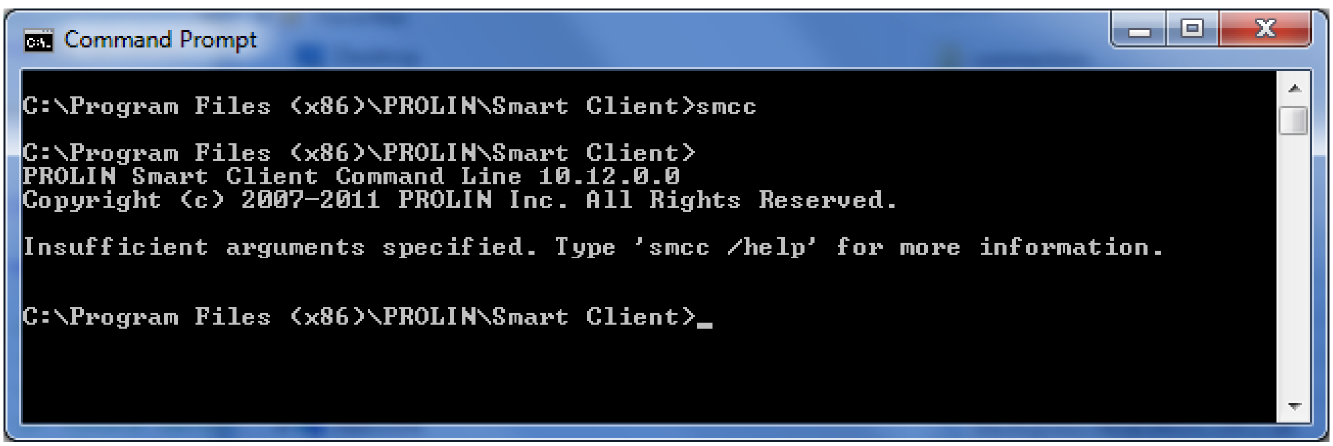
9 Advanced Topics

This chapter covers some advanced topics in order to get the maximum capabilities out of PROLIN Smart Client.

Command Line Automation	Allows you to execute some basic commands from the command line for integration purposes.
Variable Expansion	Allows you to specify certain constants which are replaced at runtime with real values.
View Performance setting	Allows you to set view loading optimized for performance or for presentation.

9.1 Command Line Automation

The **Command Line Automation** (CLA) feature allows you to execute some basic commands from the command line for integration purposes. This feature consists of a separate program named **smcc.exe** which exists in the same installation folder as PROLIN Smart Client. It can be started by typing its name from a Command Prompt window:



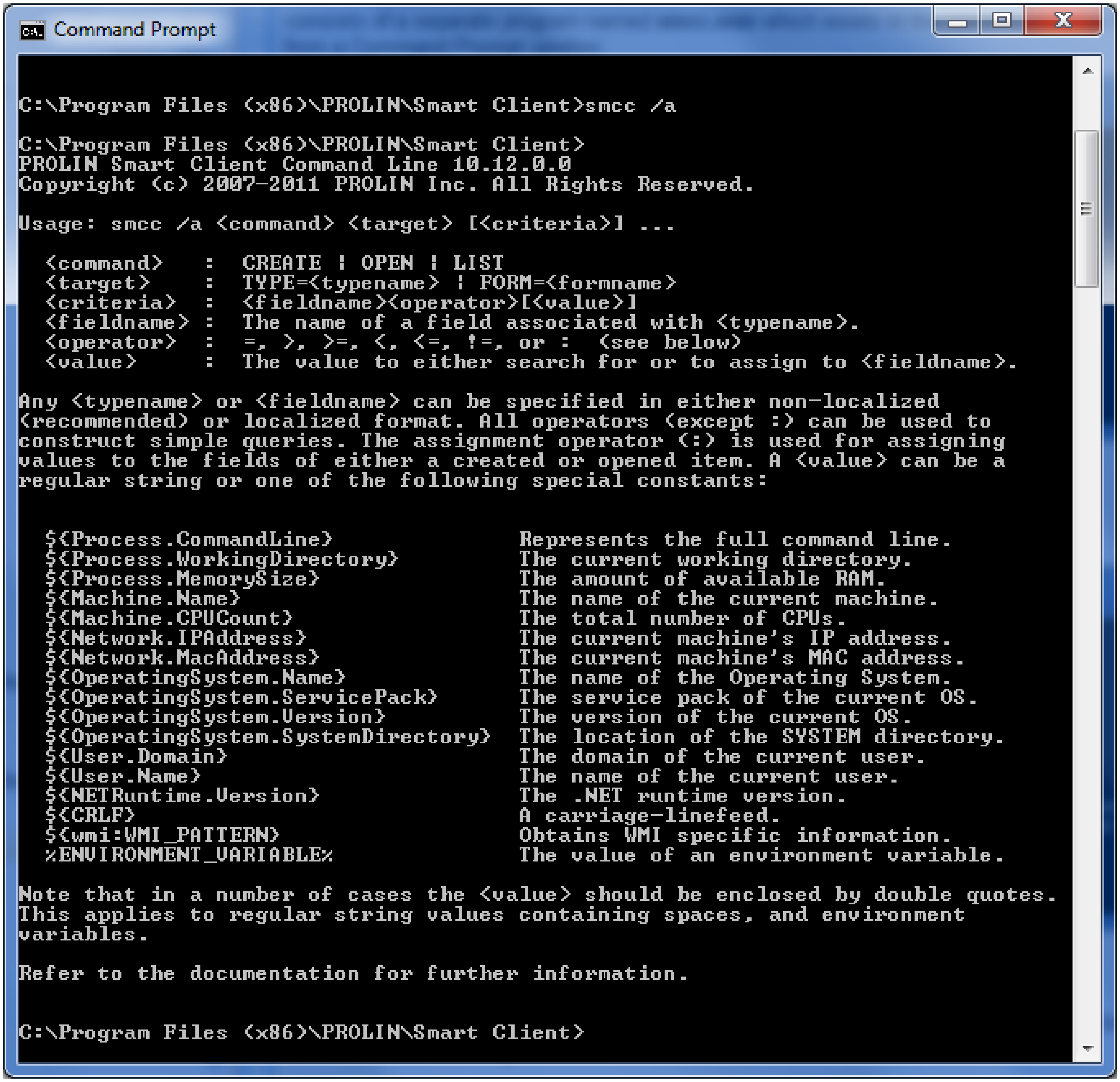
smcc (without arguments)

You can see all its options by typing "**smcc /help**" (without the quotes):

Command Prompt

```
C:\Program Files (x86)\PROLIN\Smart Client>
PROLIN Smart Client Command Line 10.12.0.0
Copyright (c) 2007-2014 PROLIN Inc. All Rights Reserved.

Usage: smcc [-options] [<args>]

Options:
  /help                       Shows this help information.
  /a                          Automation mode for sending commands.
  /timeout=<value>            Wait time for a client reponse in ms [30000].
  /UserConfigPath=<value>     Specifies a custom user configuration path.


C:\Program Files (x86)\PROLIN\Smart Client>_
```

To execute automation commands the first option must always be "**/a**" (again without the quotes) followed by a number of arguments which you can see by omitting them:



```
C:\Program Files (x86)\PROLIN\Smart Client>smcc /a

C:\Program Files (x86)\PROLIN\Smart Client>
PROLIN Smart Client Command Line 10.12.0.0
Copyright (c) 2007-2011 PROLIN Inc. All Rights Reserved.

Usage: smcc /a <command> <target> [<criteria>] ...

  <command>    :  CREATE | OPEN | LIST
  <target>     :  TYPE=<typename> | FORM=<formname>
  <criteria>   :  <fieldname><operator>[<value>]
  <fieldname>  :  The name of a field associated with <typename>.
  <operator>   :  =, >, >=, <, <=, !=, or :  (see below)
  <value>      :  The value to either search for or to assign to <fieldname>.

Any <typename> or <fieldname> can be specified in either non-localized
(recommended) or localized format. All operators (except :) can be used to
construct simple queries. The assignment operator (:) is used for assigning
values to the fields of either a created or opened item. A <value> can be a
regular string or one of the following special constants:


  ${Process.CommandLine}                Represents the full command line.
  ${Process.WorkingDirectory}           The current working directory.
  ${Process.MemorySize}                 The amount of available RAM.
  ${Machine.Name}                       The name of the current machine.
  ${Machine.CPUCount}                   The total number of CPUs.
  ${Network.IPAddress}                  The current machine's IP address.
  ${Network.MacAddress}                 The current machine's MAC address.
  ${OperatingSystem.Name}               The name of the Operating System.
  ${OperatingSystem.ServicePack}        The service pack of the current OS.
  ${OperatingSystem.Version}            The version of the current OS.
  ${OperatingSystem.SystemDirectory}    The location of the SYSTEM directory.
  ${User.Domain}                        The domain of the current user.
  ${User.Name}                          The name of the current user.
  ${NETRuntime.Version}                 The .NET runtime version.
  ${CRLF}                               A carriage-linefeed.
  ${wmi:WMI_PATTERN}                    Obtains WMI specific information.
  %ENVIRONMENT_VARIABLE%                The value of an environment variable.

Note that in a number of cases the <value> should be enclosed by double quotes.
This applies to regular string values containing spaces, and environment
variables.

Refer to the documentation for further information.


C:\Program Files (x86)\PROLIN\Smart Client>
```

smcc (with automation help)

Automation Commands

The first argument is required and specifies which automation command should be executed. Currently PROLIN Smart Client supports one of the following:

CREATE Creates a new item based on its type or form with optional values.

OPEN Opens an existing item based on specified criteria. Depending on search results this command will either start Advanced Find (multiple items found), open the item in a form (single item found), or ask the user whether a new item must be created (no items found).

LIST Shows the Advanced Find dialog with the search results.

QUIT Terminates PROLIN Smart Client.

Automation Target

The second argument is also required and specifies a so-called automation target. The notation of this argument should be one of the following:

TYPE=<typename> Uses the default form for a type specified by <typename>.

FORM=<formname> Uses the form specified by <formname>.

If either <typename> or <formname> contains you must wrap them between double quotes.

Criteria

Any following argument (after the automation command and target) is treated as criterium and you can specify as many as needed. You can use them as part of a query or to fill in fields with values. The notation of a criterium is always:

```
<fieldname><operator>[<value>]
```

The <fieldname> can be either the internal (non-localized) field name or its (localized) display name. The following operators are supported:

= Equals

> Greater than

>= Greater than or equals

< Less than

<= Less than or equals

!= Not equals

: Assignment

Note that all operators (except the assignment operator) are used for filtering purposes. The assignment operator is used to populate fields with values. Omitting the value means an empty value. You can also use wildcards (i.e. *) for queries.

Both the <fieldname> and <value> must be enclosed between double quotes when it contains spaces. For example:

```
"Closure code"="Not solved"
```

The <value> can refer to field names as well when the automation command is started from a smart action. To achieve this the value must be enclosed between square brackets:

```
"Configuration Item"=[Configuration Item]
```

There are also a number of special constants that can be used. These are replaced with runtime information upon query execution or field assignment. There are some predefined constants, but you can also use system environment variables and WMI information. For a complete list refer to Variable Expansion.

9.2 Variable Expansion

Variable Expansion allows you to specify certain constants which are replaced at runtime with real values. This functionality can be used in filter conditions, but also as command line argument for the Command Line Automation (CLA) feature. Besides some predefined standard constants you can also refer to system environment variables using the the following syntax:

```
%VARIABLE_NAME%
```

For example:

```
%OS%
```

Standard Constants

```
${Process.CommandLine}
${Process.WorkingDirectory}
${Process.MemorySize}
${Machine.Name}
${Machine.CPUCount}
${Network.IPAddress}
${Network.MacAddress}
${OperatingSystem.Name}
${OperatingSystem.ServicePack}
${OperatingSystem.Version}
${OperatingSystem.SystemDirectory}
${User.Domain}
${User.Name}
${NETRuntime.Version}
${CRLF}
```

WMI Constants

The WMI constants always use the following notation:

```
${wmi:<ClassName>}
```

The <ClassName> refers to a WMI class, for example:

```
${wmi:Win32_LogicalDisk}
```

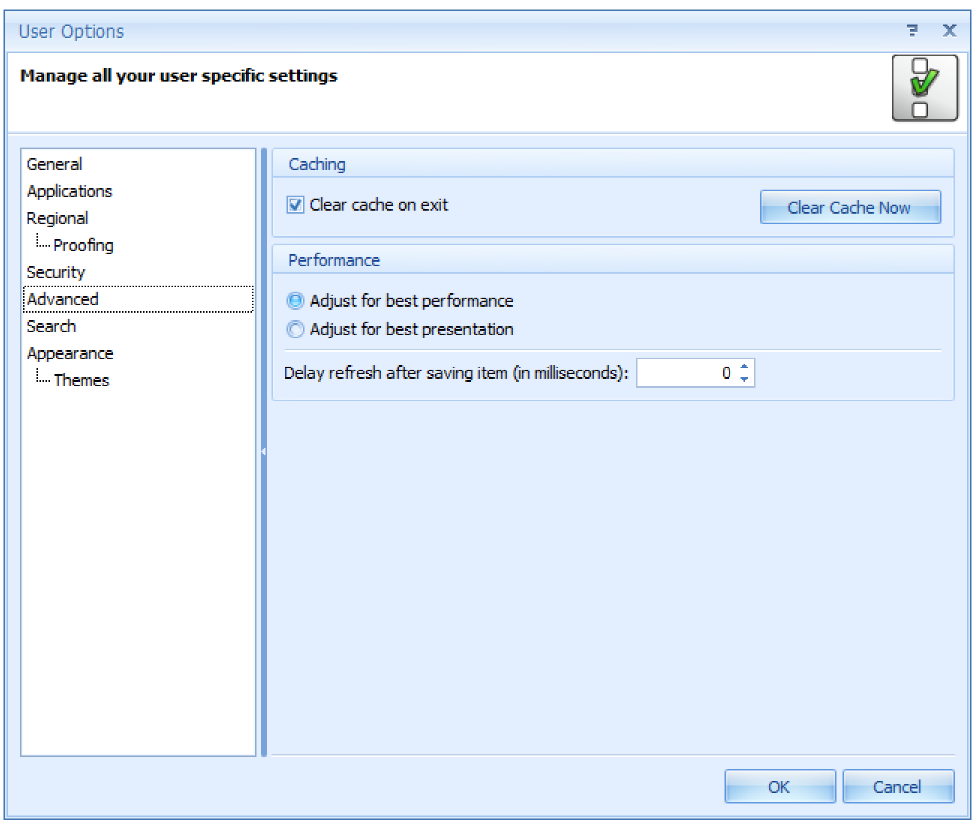
Also, you can select a specific object like this:

```
${wmi:Win32_LogicalDisk[Name='D:'].Size}
```

For a complete list of WMI classes refer to http://msdn.microsoft.com/en-us/library/aa394084(VS.85).aspx.

9.3 View performance setting

Using the setting shown below you can improve performance of views by limiting the number of rows that is taken into account for best fit calculation.



When best fit is being calculated for a view with a large number of rows, all those rows are taken into account which brings down performance.

In the User Options window under Advanced users can influence how Smart Client behaves when loading views.

The user can choose from two options:
1) Adjust for best performance (default)
2) Adjust for best presentation

The result of the first option is that for table views the first 1000 rows are taken into account when calculating the best-fit widths for the columns. The second option takes all rows into account.

Note: When switching options PROLIN Smart Client needs to be restarted to activate the change.

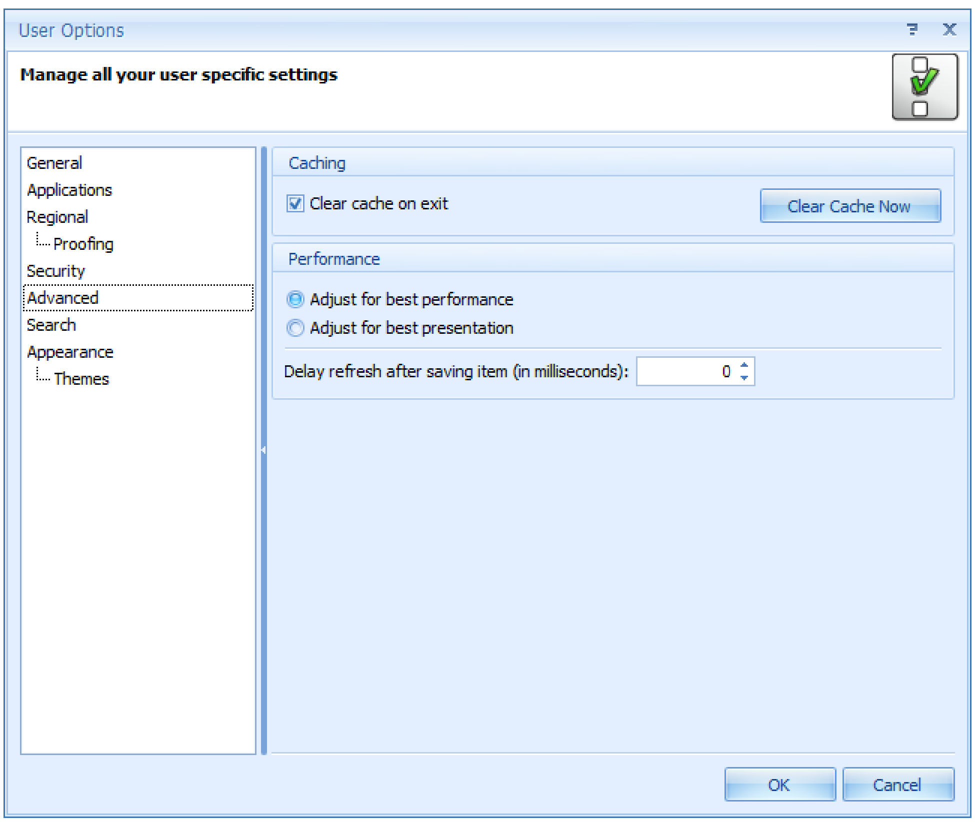
9.4 Delay refresh after save item

This setting can be used in situations where the refresh of an item in the form after save is done before the server side (database) rules are done. In some exceptional cases this can occur and setting this value can help solving that synch issue.

The value can range from 0 - 5000 (ms). The value "0" means there is no delay used.

This value can be set via a startup parameter as well. See the installation manual for more information on this, and other, startup parameters of PROLIN Smart Client.

Please always check with you administrator before setting this parameter.



9.5 Service call Hierarchy

This function is available in PROLIN Smart Suite 2016 R5 and later versions.

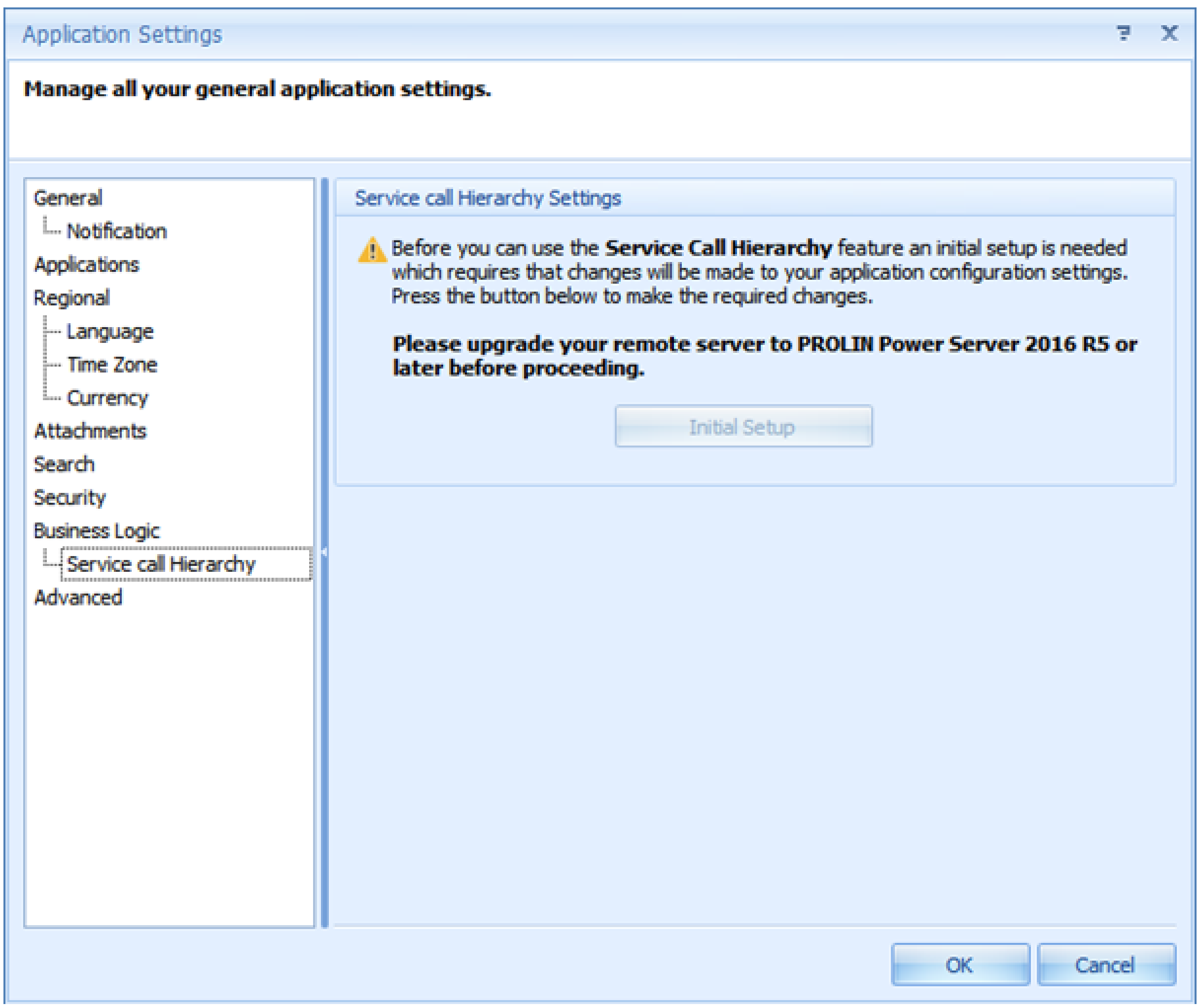
It allows users to link service calls to service calls and thus create a Master - Subordinate structure.

Initialize Service call Hierarchy

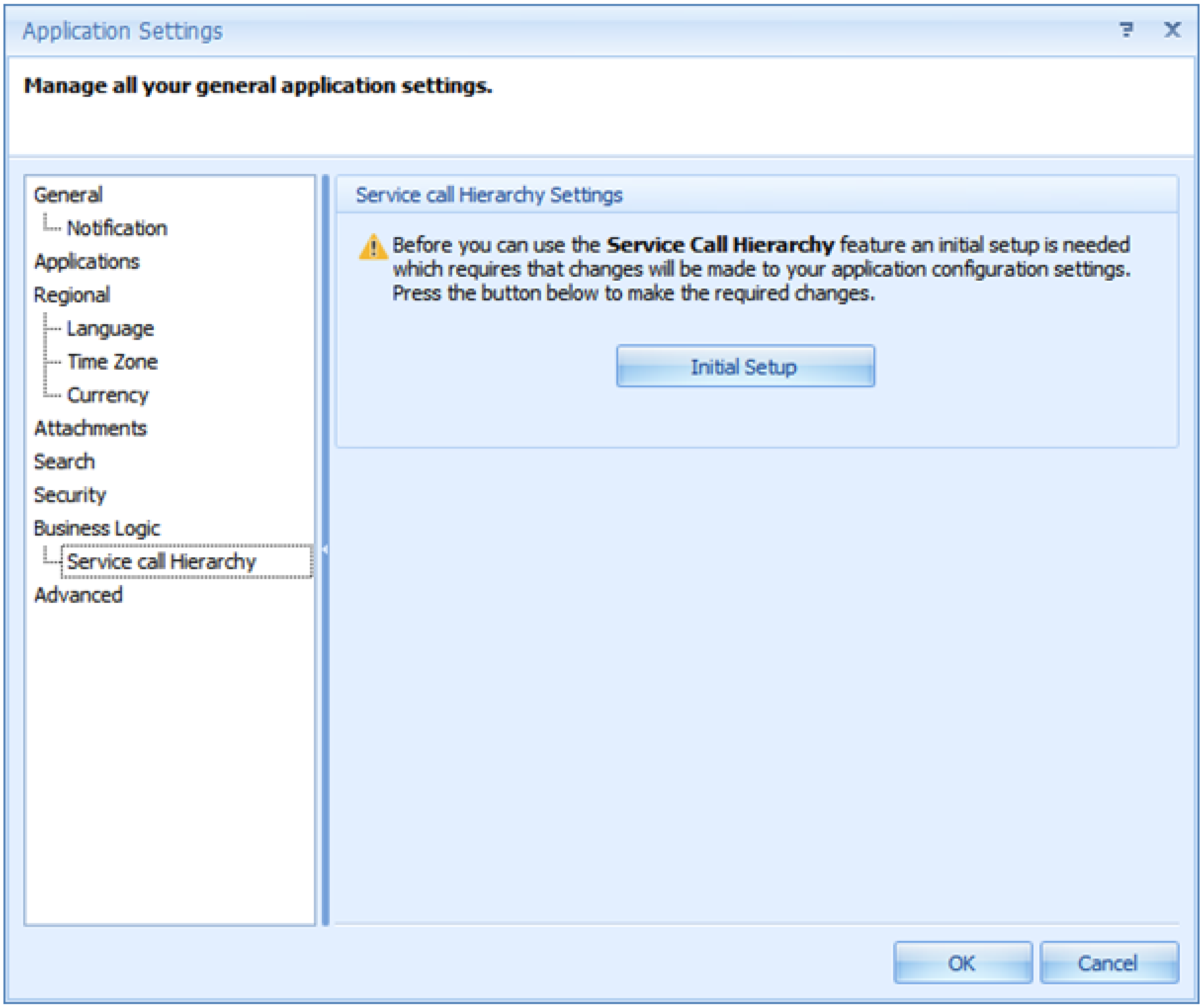
In order to use this functionality some settings have to be set in the database. This can be done in the Admin - Application Settings dialog.

Go to **Business logic - Service call Hierarchy**

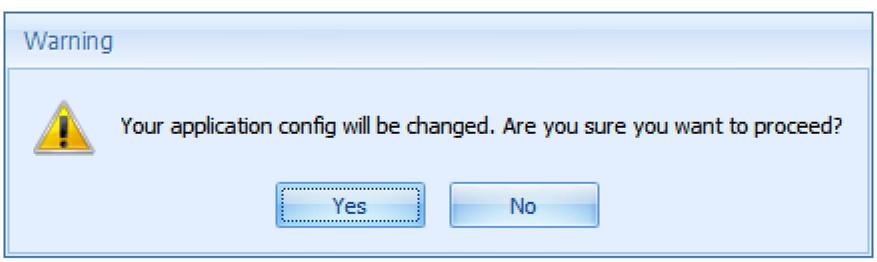
If you are not connected to the correct version of Power Server (2016 R5) you will see below message and the button will be disabled.



If you are connected to a correct version of Power Server you will see below message and the button is enabled.



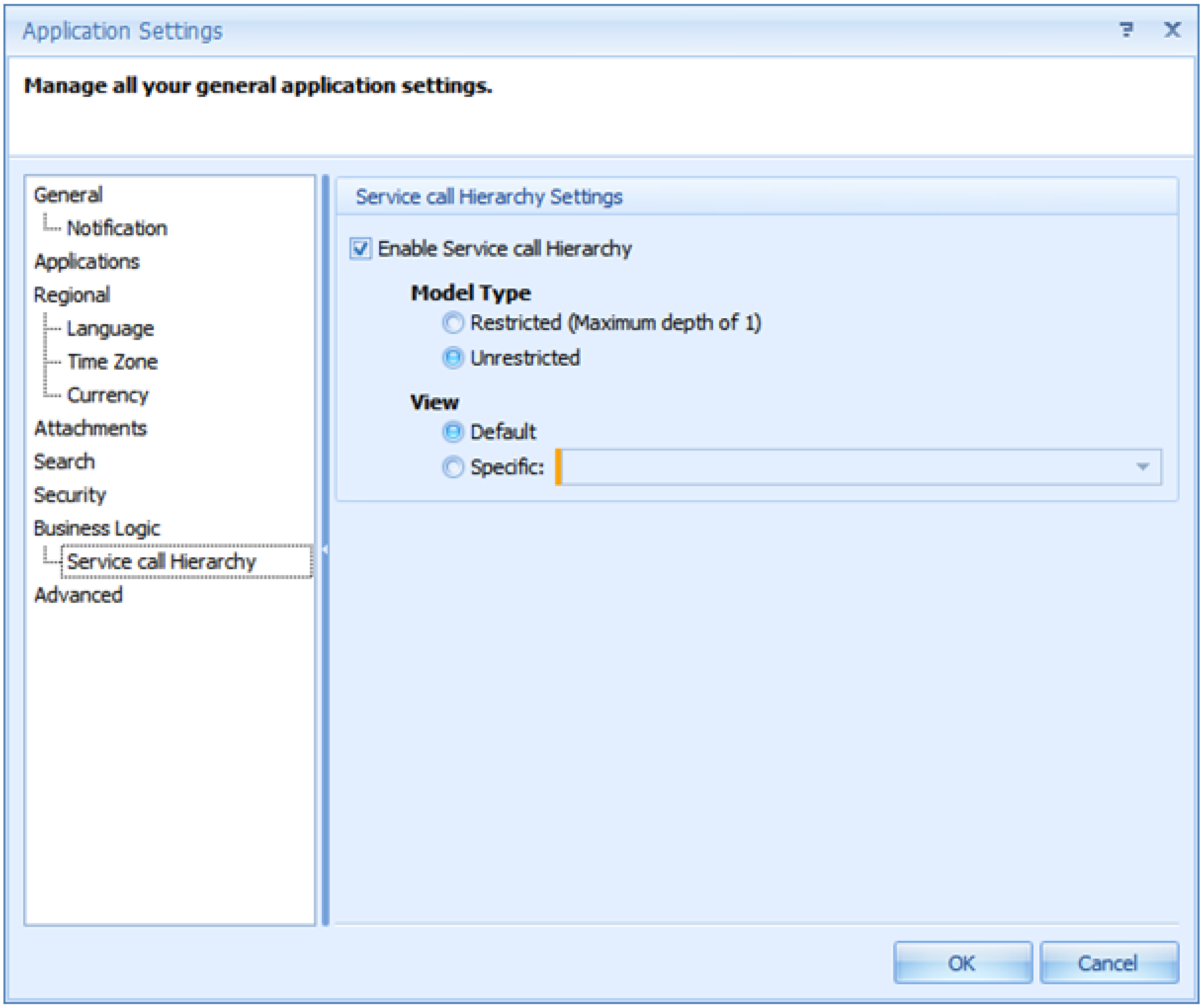
If you press the **Initial Setup** button you will get a dialog asking to confirm that you will be making some additions to the database.



The changes are only for adding the Service call Hierarchy, no existing data is changed.

Service call Hierarchy settings

After the initial setup was successful you will get below dialog when going to **Business logic - Service call Hierarchy** in the application settings function.



In this dialog the Service call Hierarchy function can be enabled (by default the function is disabled).

Furthermore the following settings can be set here:

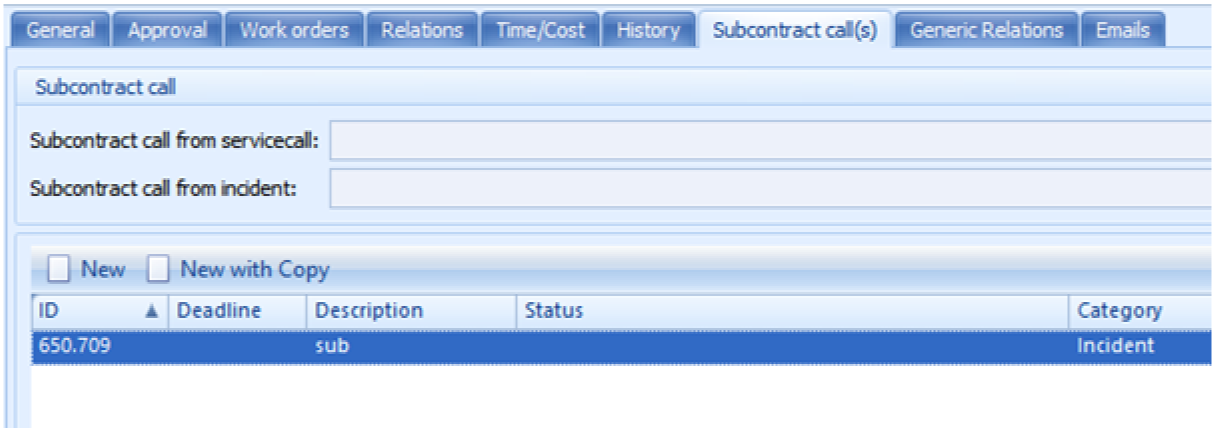
Model Type: choose between **Restricted** which means the structure can only go one level deep or **Unrestricted** which allows for unlimited levels.

View: choose whether you want to use the default view or a specific selected view when showing subordinate calls.

NOTE: PROLIN Smart Client needs to be restarted for all users to be able to use the Service call Hierarchy feature when enabled (the same is the case when Service call Hierarchy is disabled).

Use Service call Hierarchy

Users can use the Service call Hierarchy function in the Subcontract calls section in a Service call form. The Collection Editor has two new buttons: **New** and **New with Copy**.



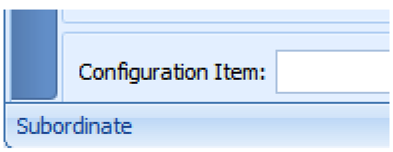
If you use one of these buttons to create a new service call, the active service call automatically becomes the Master service call. The newly created service call will be the subordinate of that master service call.

The "New" button allows the user to create a new Service call, which will be added as a Subordinate to the current Service call.

The "New with Copy" button allows the user to create a new Service call with values of fields from the Master Service call being copied over to the new Subordinate Service call.

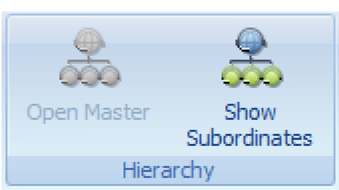
The fields that will be copied are defined in the Copy Fields section in the Admin Console.

When the Service call Hierarchy function is enabled there are three types of Service calls: Regular, Master and Subordinate. When the Service call is a Master or Subordinate, this is shown in the status bar on the bottom of the form:



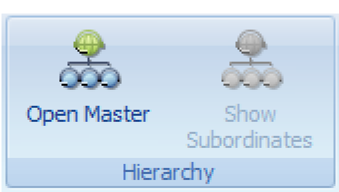
When the Service call Hierarchy function is enabled, two extra buttons will be available in the ribbon of Service call Forms.

If you are in a master service call, the **Show Subordinates** button is enabled:



If you click it, it executes an Overview action that shows the direct Subordinate Service calls for this master item.

If you are in a Subordinate Service call, the **Open Master** button is enabled:



Clicking this opens the Master Service call.

In a regular call (not a Master not a Subordinate Service call) both buttons are disabled.

10 Administration Module

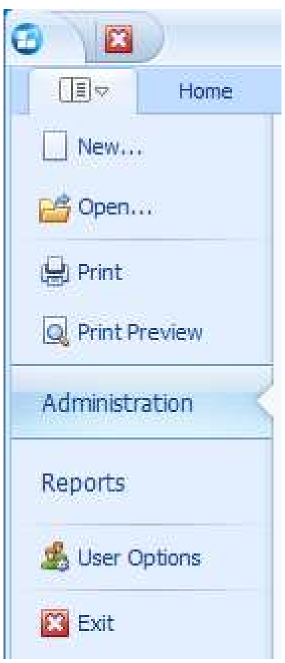
This chapter covers the functionality of the Administration module of PROLIN Smart Client.

10.1 Starting the Administration Module

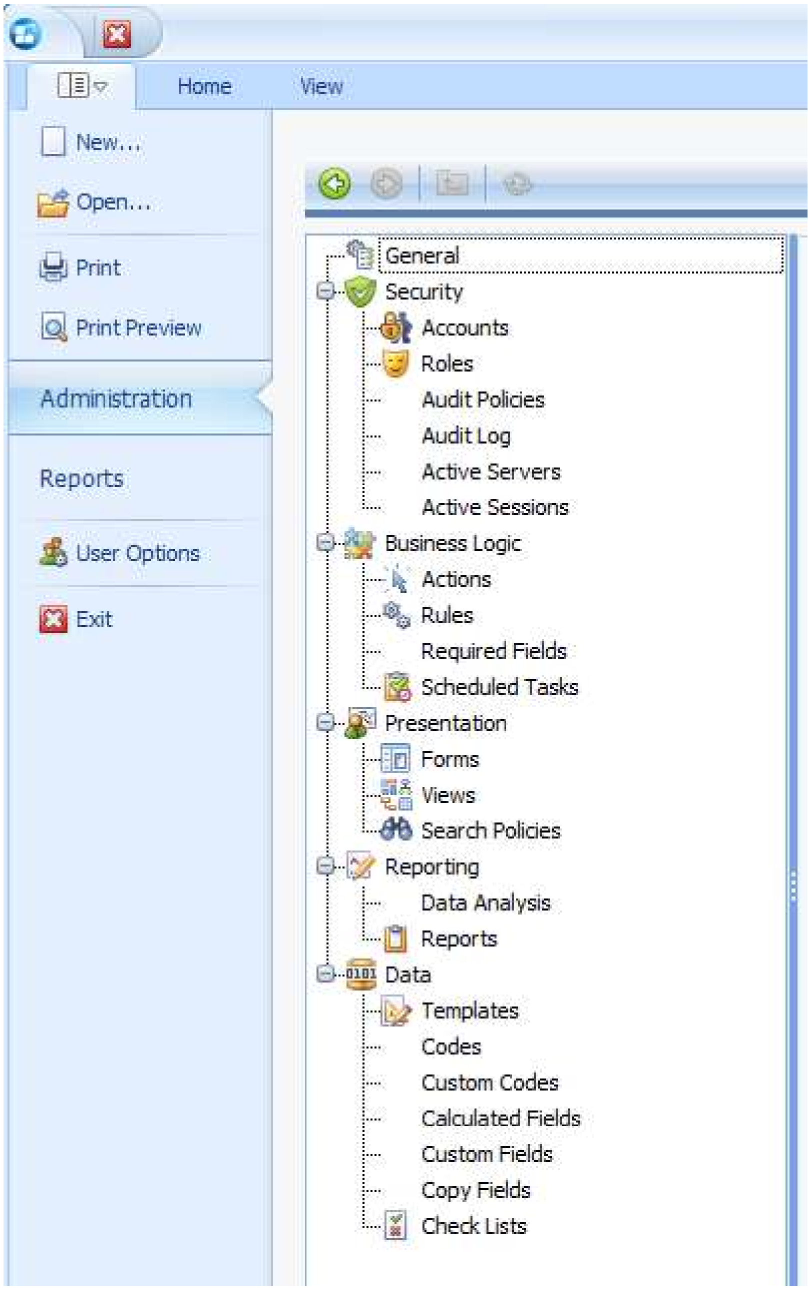
To initiate the Administration module make sure PROLIN Smart Client is started and you are logged in.

Note: The admin functionality is not available if the admin module has not been installed or the logged in user is not authorized under the System administrator role.

The Admin Client can be started from the **Application** menu. The **Application** menu can be found to the left of the **Home** tab in the ribbon. The following image shows the **Application** menu.



Selecting **Administration** from the **Application menu** will display the PROLIN Admin Client main menu.

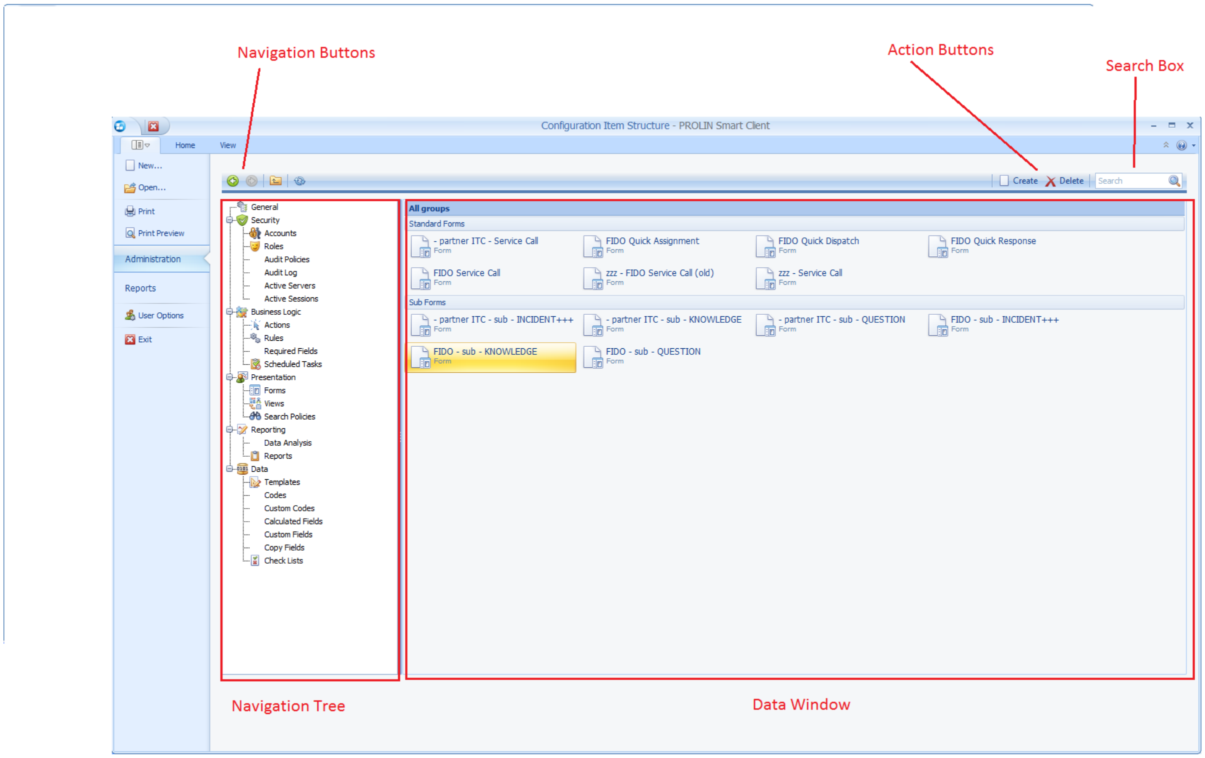


10.2 Navigation

The main admin menu is where all the admin functions are located. See the next chapter for a map of SD admin functions to identify where they are located in the new PROLIN Admin Client.

The navigation In PROLIN Admin Client has been improved to make it easier to find functions by providing a more generic way to navigate between functions and the data in those functions.
The "General" item has its own layout due to the general nature of the items that can be modified under this group.
All other items have a similar method to navigate through them which are described below.

When a function is opened a screen similar to the one below is shown.



Administration Console

The screen consists of a toolbar, a Navigation Tree and a Data Window.

The toolbar contains the following items:

Navigation buttons	Buttons for “Back”, “Forward”, "Go Up" and "Refresh" view navigation.
Action buttons	Possibility to create a new item or delete an item for sections where this is valid.
Search box	Performs a search on the data in the data window.

The Navigation Tree shows all available administration functions.

The data window shows the data for that section. Depending on where you are you can either drill-down into the data shown or open it for editing. For example, under **Presentation – Forms** you will view all available entities (Change, Problem, etc.) in the data window. When you double click on an entity it shows all forms for that entity. If you double click on a form it opens the data dialog.

10.3 Mapping Service Desk functions

Some admin functions in the PROLIN Administration module are placed in a different group when compared to Service Desk. The table below shows all currently available administration functions, where they are located in Service Desk and where they are located in the new PROLIN Administration module.

SD Function	PROLIN Administration module	
ee location	***dmin group***	***ection***
Analyzed data	Reporting	Data Analysis
Business logic – Actions – Overview actions	Business logic	Actions
Business logic – Actions – Smart actions	Business logic	Actions
Business logic – Application	General	Application Settings
Business logic – Scheduled Tasks	Business logic	Scheduled Tasks
Business logic – Database rules	Business logic	Rules
Business logic – UI rules	Business logic	Rules
Data – Copy Fields	Data	Copy Fields
Data - Custom Fields	Data	Custom Fields
Data - Calculated Fields	Data	Calculated Fields
Data – Custom Code	Data	Codes
Data – Codes	Data	Codes
Data – Templates	Data	Templates
Data - Checklist - General Checklist	Data	Check Lists
Data - Checklist - Service Checklist	Data	Check Lists
Data - Checklist - Classification Checklist	Data	Check Lists
Presentation – Forms	Presentation	Forms
Presentation – Views	Presentation	Views
Presentation - Search	Presentation	Search Policy
Security – Access – Applications Account	Security	Accounts
Security – Access – Role	Security	Roles
Security – Audit – Audit rules	General	Application Settings - Security - Auditing
Security – Audit – Logged on users	Security	Active Sessions
Security – Audit – Active Application Servers	Security	Active Servers
Security - Enhanced Auditing - Audit Log	Security	Audit Log

Security - Enhanced Auditing - Configuration		General	Application Settings - Security - Auditing
Security – Prevention – Required fields		Business logic	Required Fields
System panel – General Settings		General	Application Settings
System panel – Password settings		General	Application Settings
System panel - Regional		General	Application Settings

Index

- N -

- O -

- P -

- Q -

- R -

- S -

- T -

- U -

- V -

- W -

- Y -