

Navigating in XT Client 4.0

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Introduction

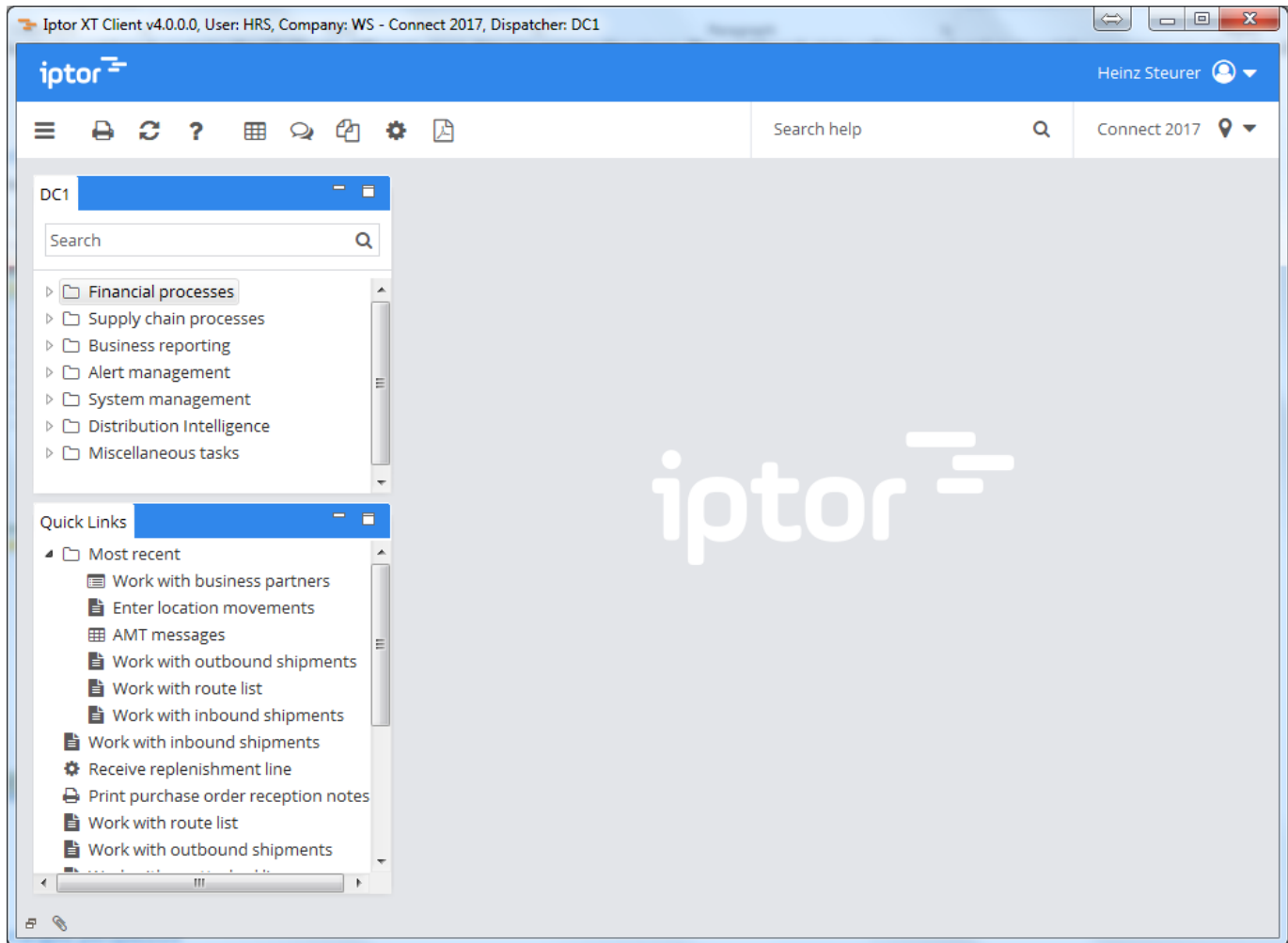
The way of navigating in XT Client has changed in XT UI versions later than v2.5.x. In this document you will a summary of the changes.

The Client Workbench (Perspective)

The client workbench contains the XT Client's different views. You can arrange the views. The workbench state will be saved and restored the next time you start the client.

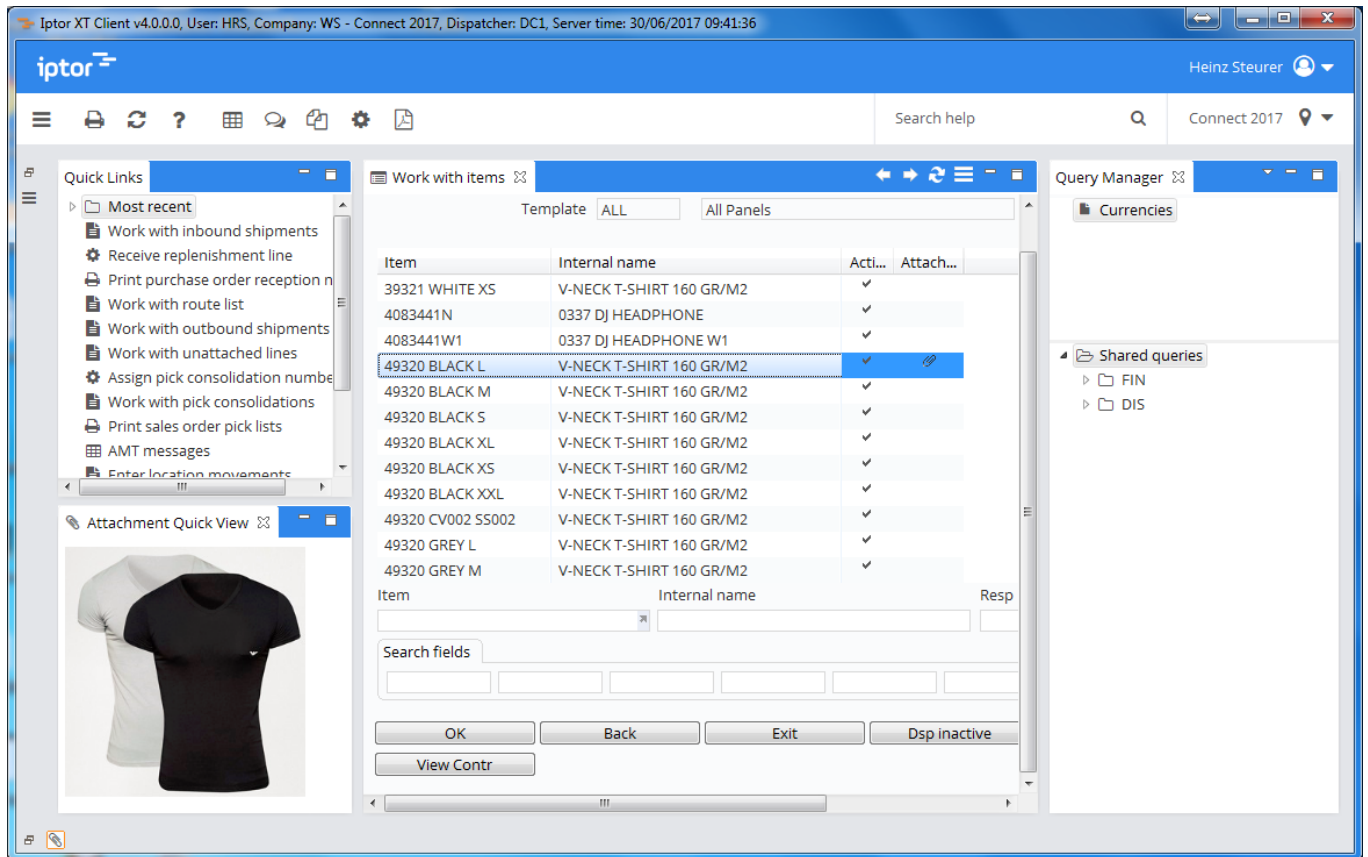
Default perspective

The client workbench default configuration.





Arranged perspective

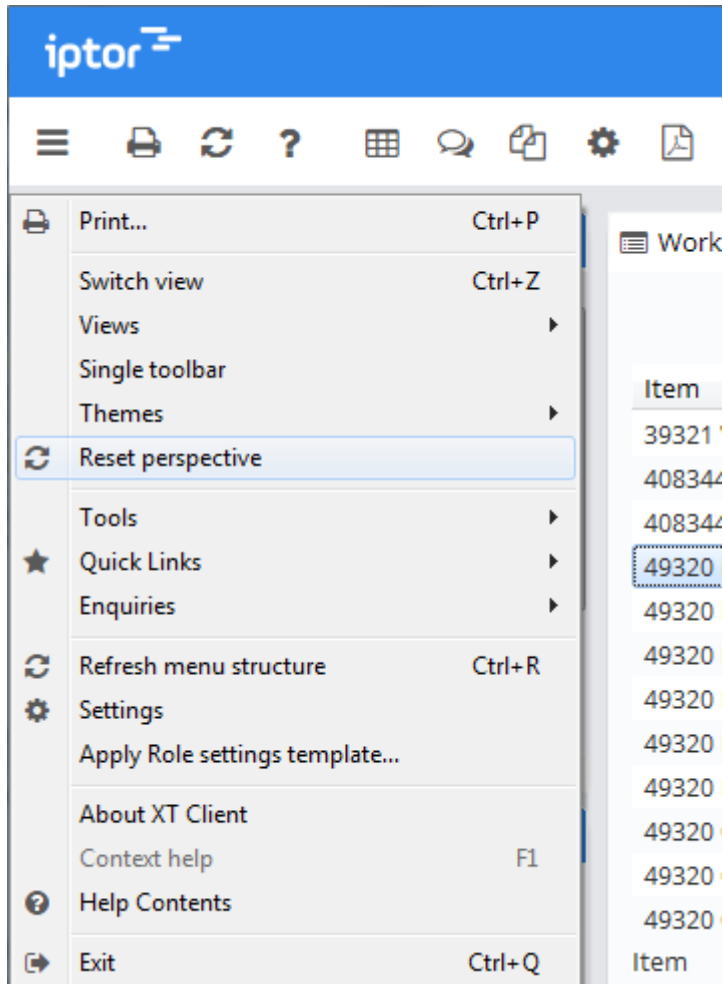
In this example the client perspective has been arranged by moving, resizing and adding views.



Reset perspective to default

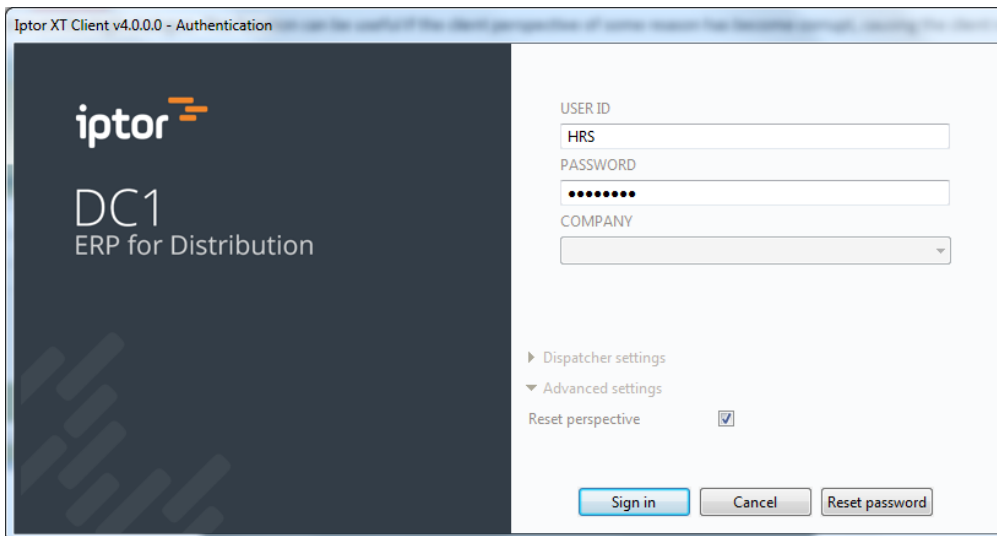
You can always reset your perspective to default by using the 'Reset perspective' function which can be found on the client's main menu  and the toolbar .

Reset perspective – XT Client workbench



Reset perspective – Login dialogue

You can select to reset the perspective on the login dialogue. This function can be useful if the client perspective of some reason has become corrupt, causing the client not to start.

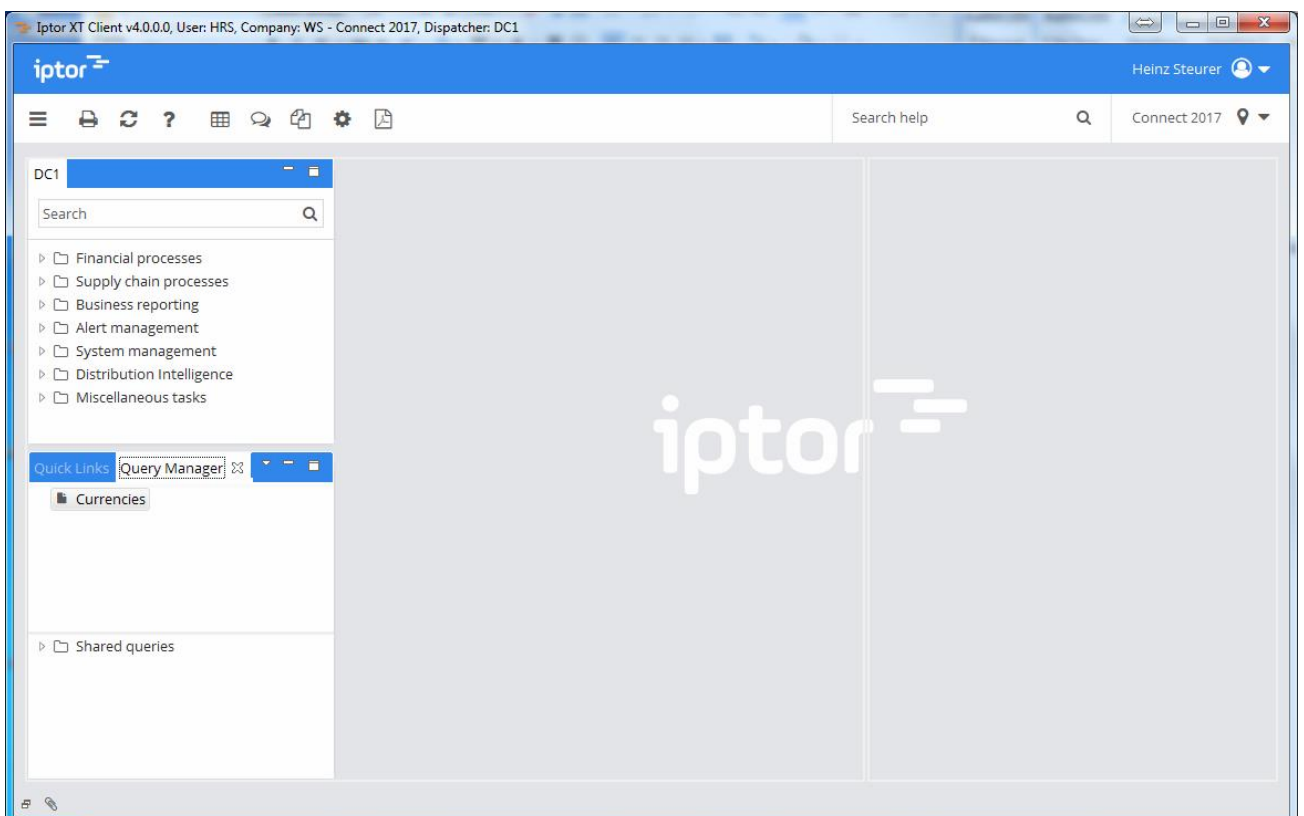


Moving / resizing views

Note! Currently moving views I supported for the Windows client only, NOT for thin Web browser client.

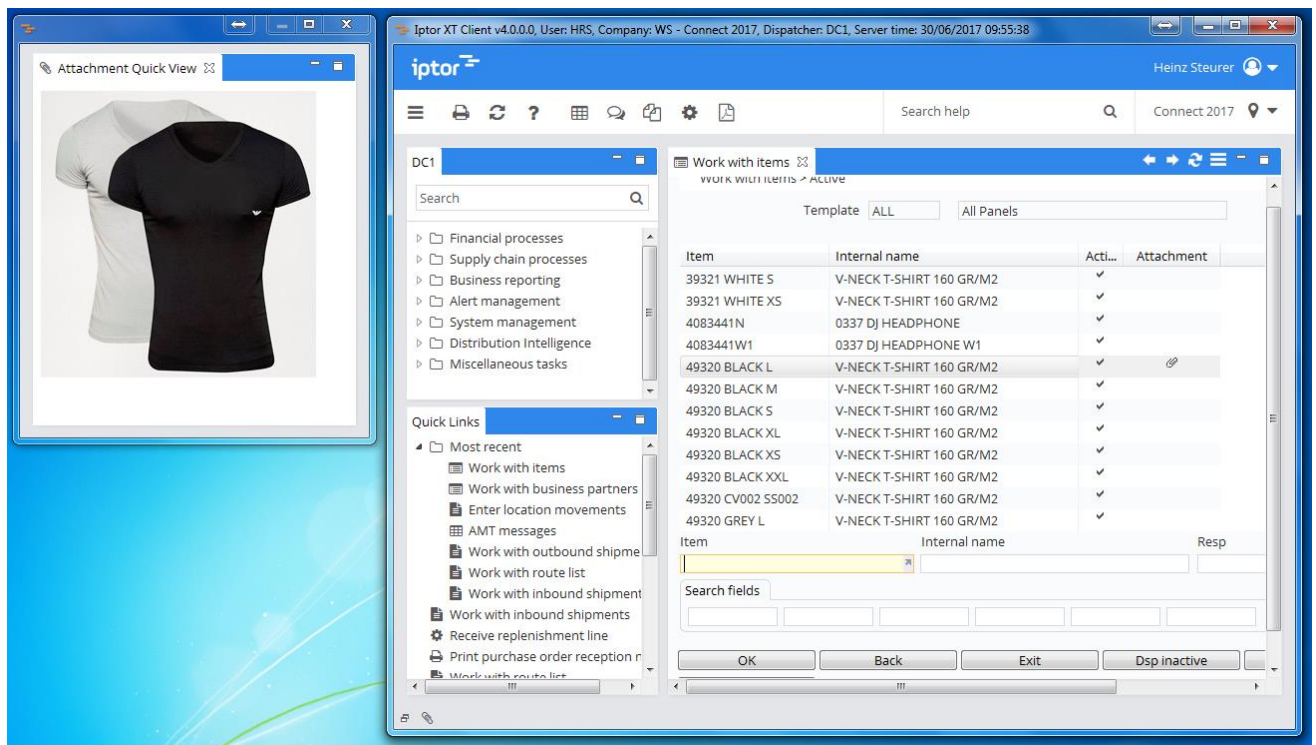
Moving views inside the workbench

You can move views by dragging the view's tab to the required location. When dragging the view over the workbench you will get an indication, (see below), if it is allowed to drop the view. You can resize views by grabbing the borders with your mouse.



Moving views outside the workbench

You can move views outside the workbench. To put back the view inside, drag the tab to the required place in the workbench, alternatively reset the perspective.



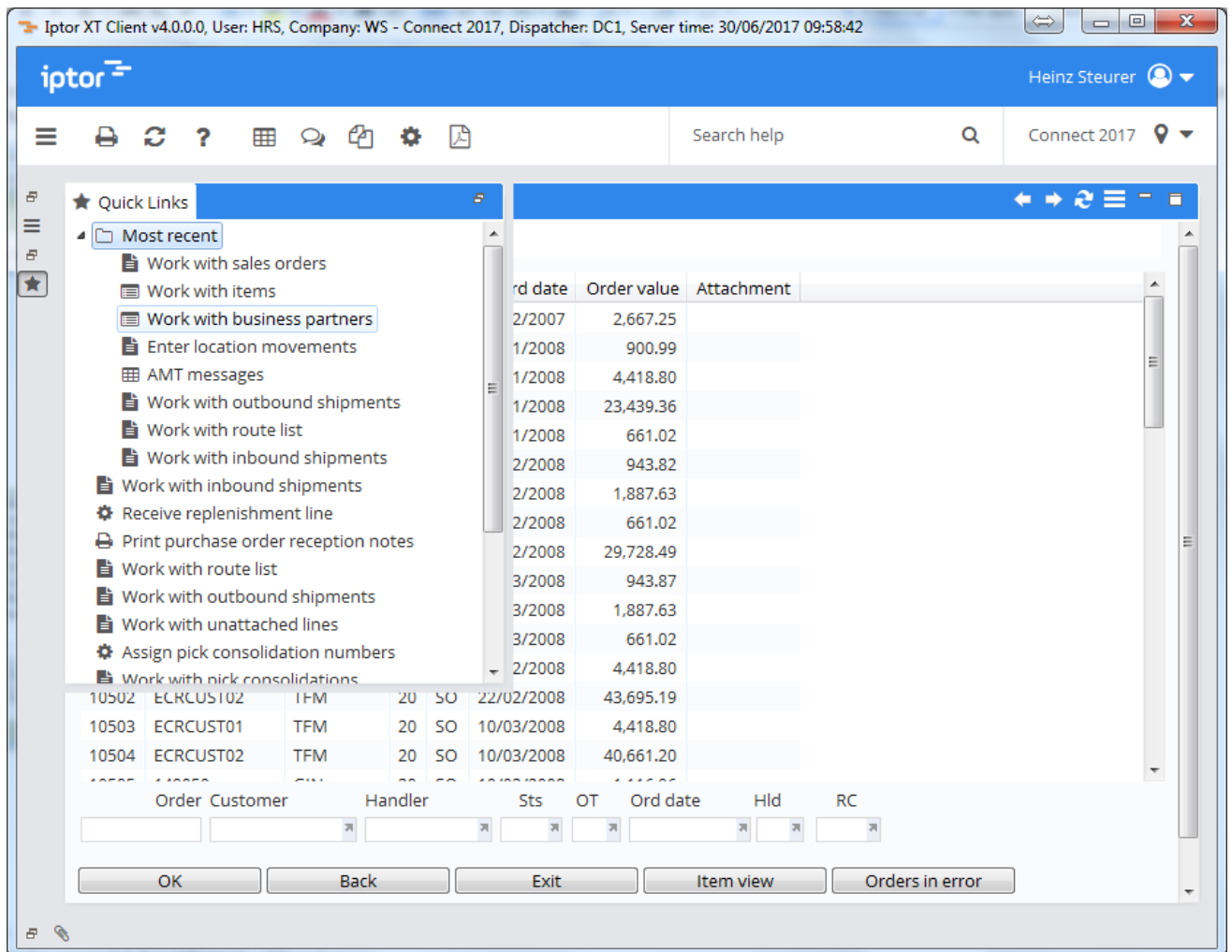
Maximizing views

You can quickly maximize views by double-clicking on the tab, alternatively clicking the maximize icon in the top-right corner. The remaining views are minimized to the toolbars.

The screenshot displays the Iptor XT Client v4.0.0.0 interface. The title bar shows the user is HRS, Company: WS - Connect 2017, Dispatcher: DC1, and the server time is 30/06/2017 09:58:42. The main window is titled "Work with sales orders" and is in "Header view". The data is presented in a table with the following columns: Order, Customer, Handler, St, OT, Ord date, Order value, and Attachment. Below the table, there are input fields for Order, Customer, Handler, Sts, OT, Ord date, Hld, and RC, along with buttons for OK, Back, Exit, Item view, and Orders in error.

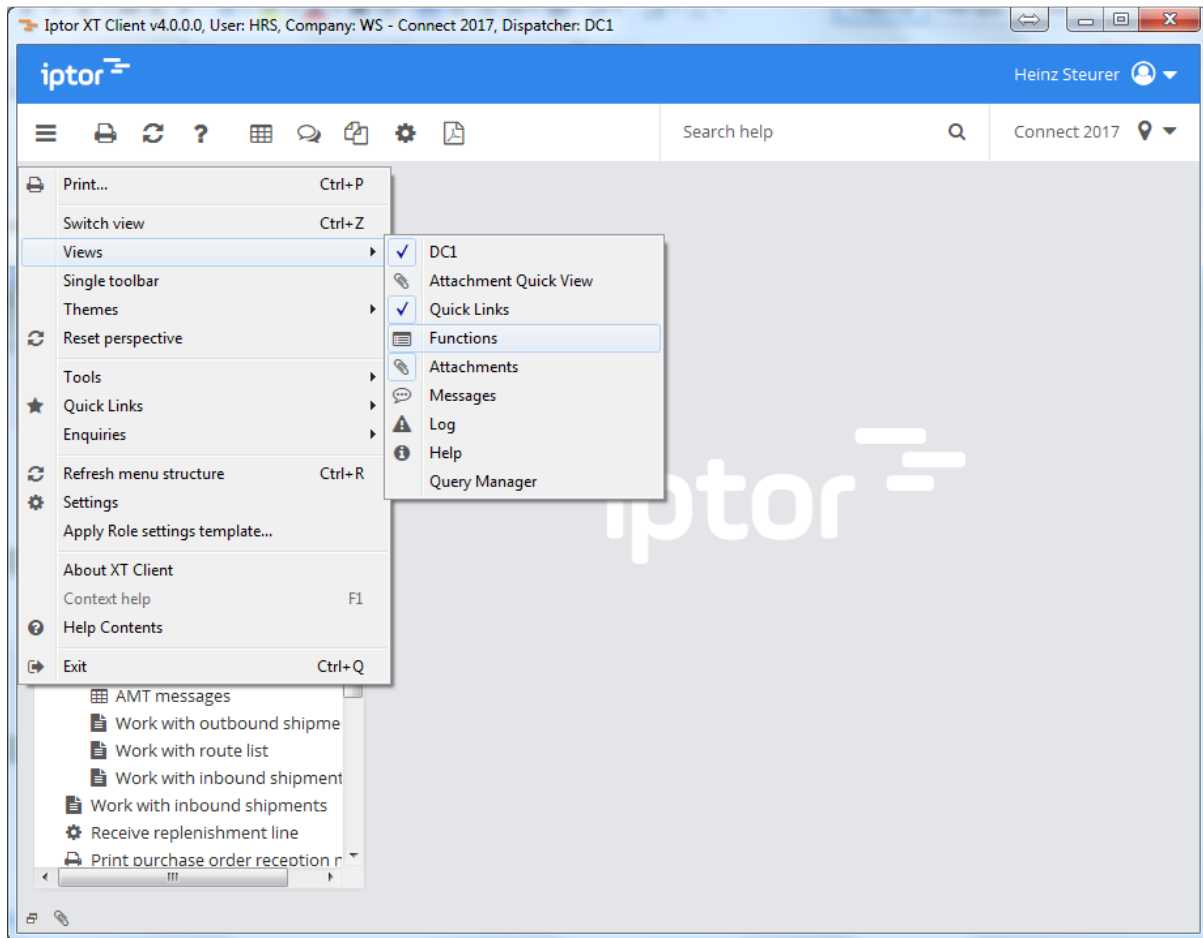
Order	Customer	Handler	St	OT	Ord date	Order value	Attachment
10446	150250	SJA	45	DI	18/12/2007	2,667.25	
10448	150250	SJA	10	SO	09/01/2008	900.99	
10451	ECRCUST01	TFM	20	SO	09/01/2008	4,418.80	
10452	ECRCUST02	TFM	20	SO	09/01/2008	23,439.36	
10457	ECRCUSTOMER	SWD	20	SO	09/01/2008	661.02	
10486	ECRCUST01	SWD	20	SO	22/02/2008	943.82	
10487	ECRCUST02	SWD	20	SO	22/02/2008	1,887.63	
10488	ECRCUSTOMER	SWD	20	SO	22/02/2008	661.02	
10490	150250	GIN	30	SO	22/02/2008	29,728.49	
10498	ECRCUST01	SWD	20	SO	10/03/2008	943.87	
10499	ECRCUST02	SWD	20	SO	10/03/2008	1,887.63	
10500	ECRCUSTOMER	SWD	10	SO	10/03/2008	661.02	
10501	ECRCUST01	TFM	20	SO	22/02/2008	4,418.80	
10502	ECRCUST02	TFM	20	SO	22/02/2008	43,695.19	
10503	ECRCUST01	TFM	20	SO	10/03/2008	4,418.80	
10504	ECRCUST02	TFM	20	SO	10/03/2008	40,661.20	

If you want to work in maximized mode you can access the other views by clicking on the corresponding icon on the toolbar. E.g. the quick links. After selecting an option the quick links view will go back in minimized state. You can reset the view to its original size by a new double-click on the tab, alternatively the restore icon in the top-right corner.



Open / close views

The available views can be opened / closed from the **'Views'** menu.

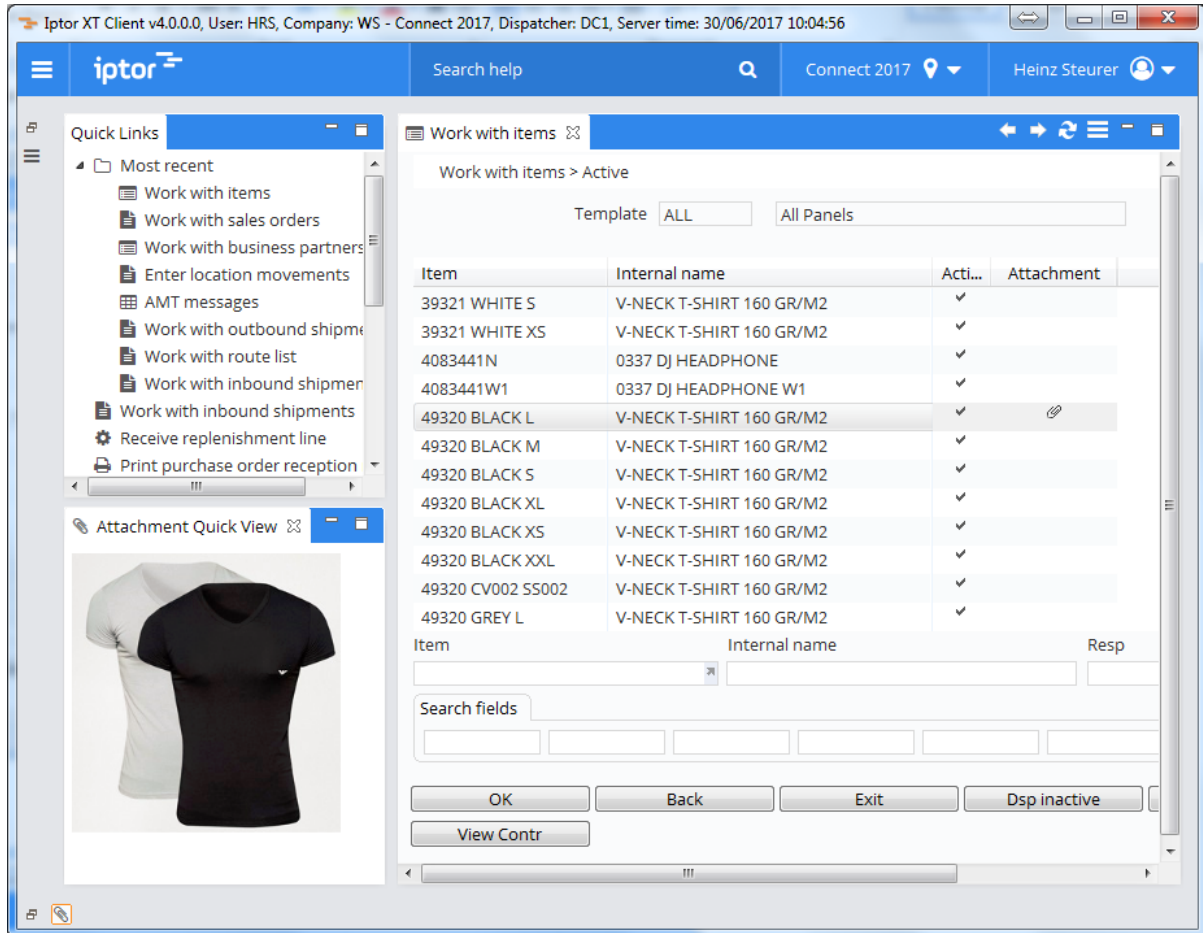


The toolbar

All client functions can be accessed from the menu icon, (hamburger), on the toolbar.

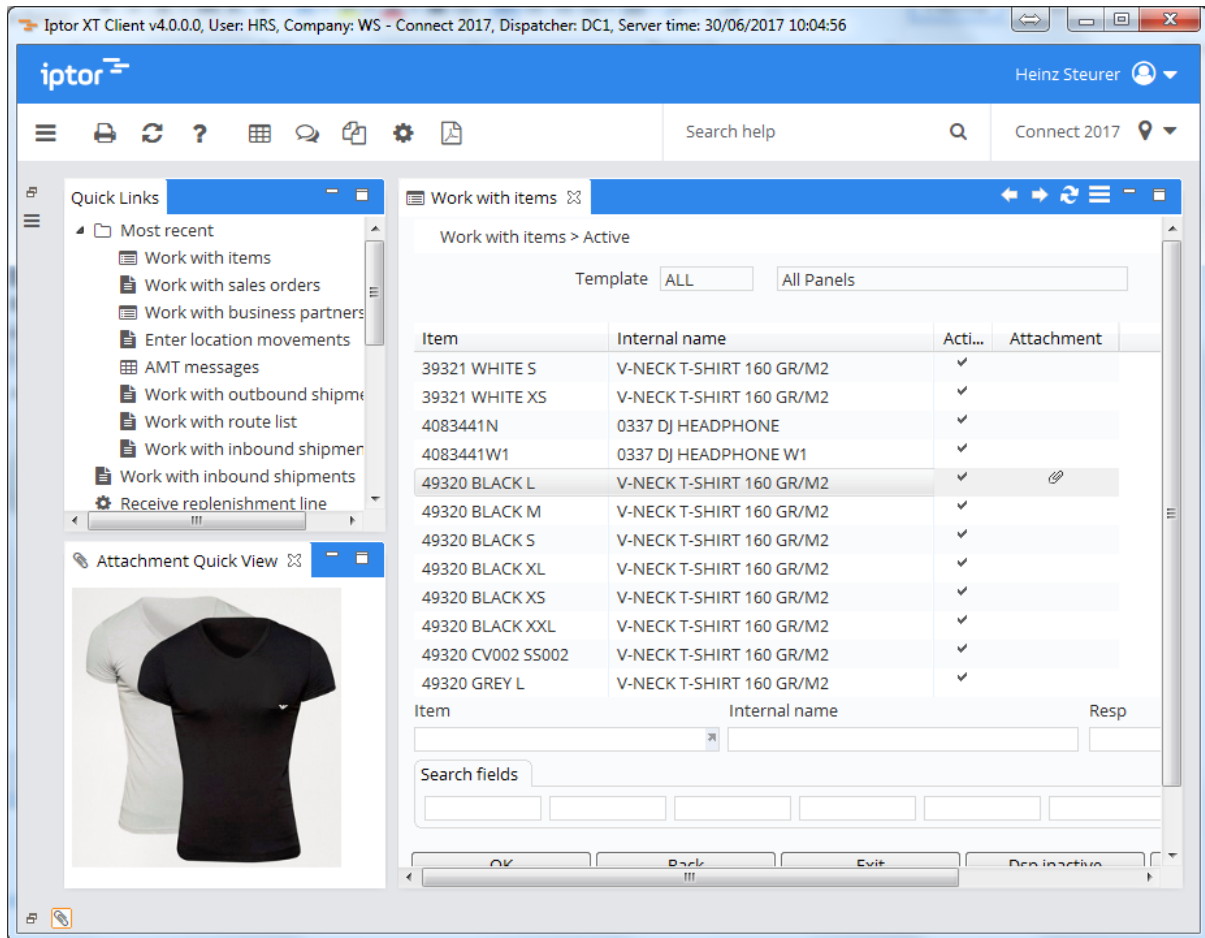
Single toolbar

Click on the main menu main menu icon and select 'Single toolbar'.



Double toolbar

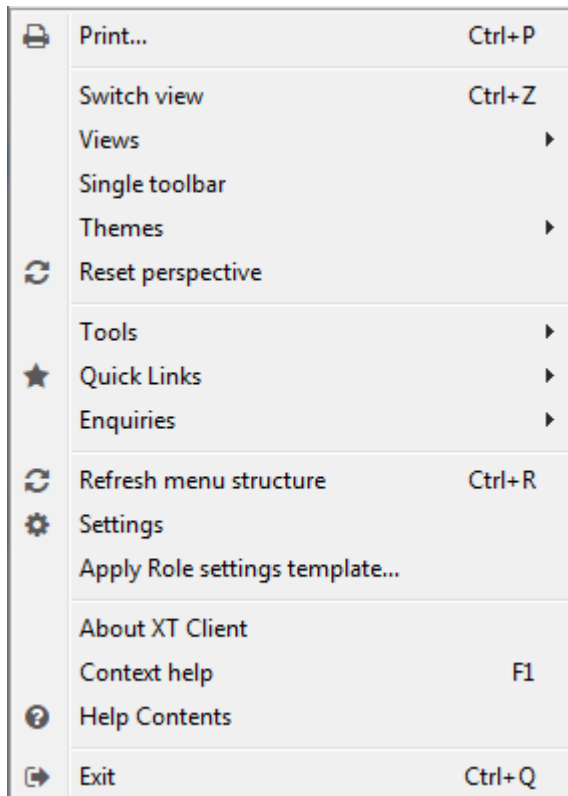
Click on the main menu main menu icon and deselect 'Single toolbar'.



Toolbar elements

Main menu

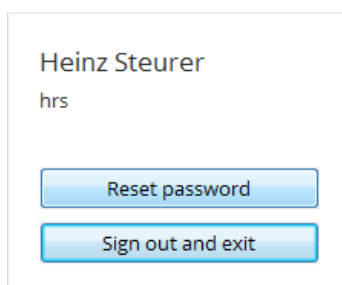
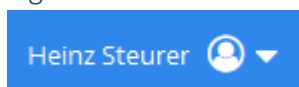
Click the hamburger icon, alternatively **Ctrl-F9** to open the main menu.



Logo



Signed in user

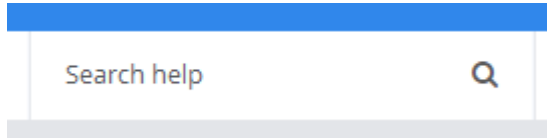


Functions

Toolbar icons are configured in the menu system (MEDEA).

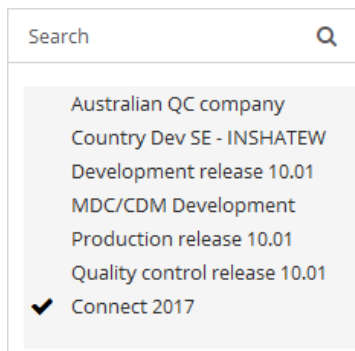
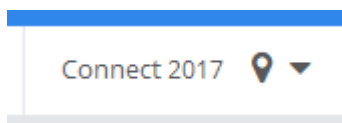


Help search

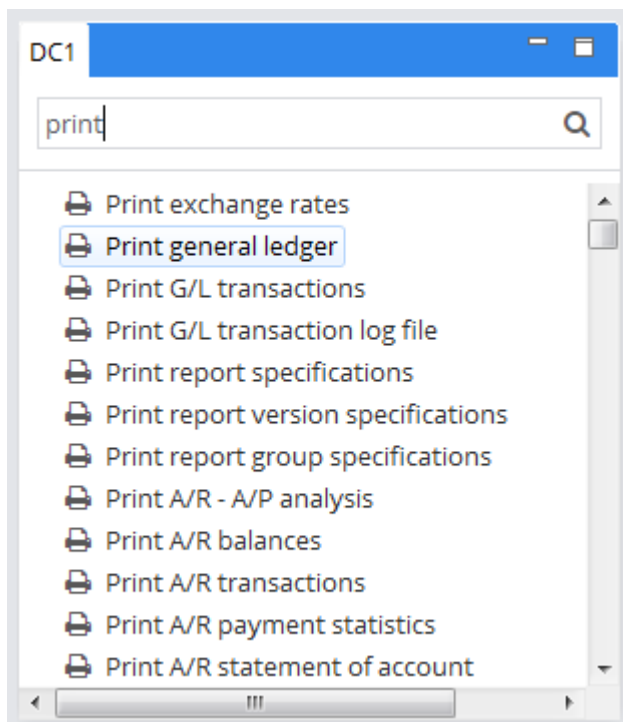


Selected company

Change the company to work with. You use the search while typing function to find the required company. Search also works for the company code.



The menu structure



You can find required menu items quickly by using the search while typing function.

Important shortcuts

Open the main menu

Ctrl-F9 opens the client main menu

Open the panel menu

Ctrl-F10 opens the menu for the panel in focus.

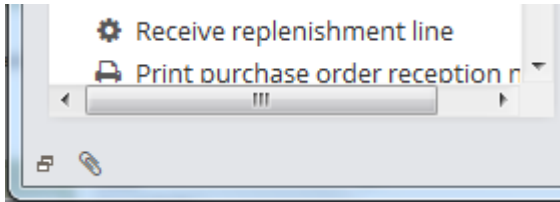
Open the view switcher

Ctrl-Z opens the view switcher which allows you to toggle between the different views / tabs in the workbench.

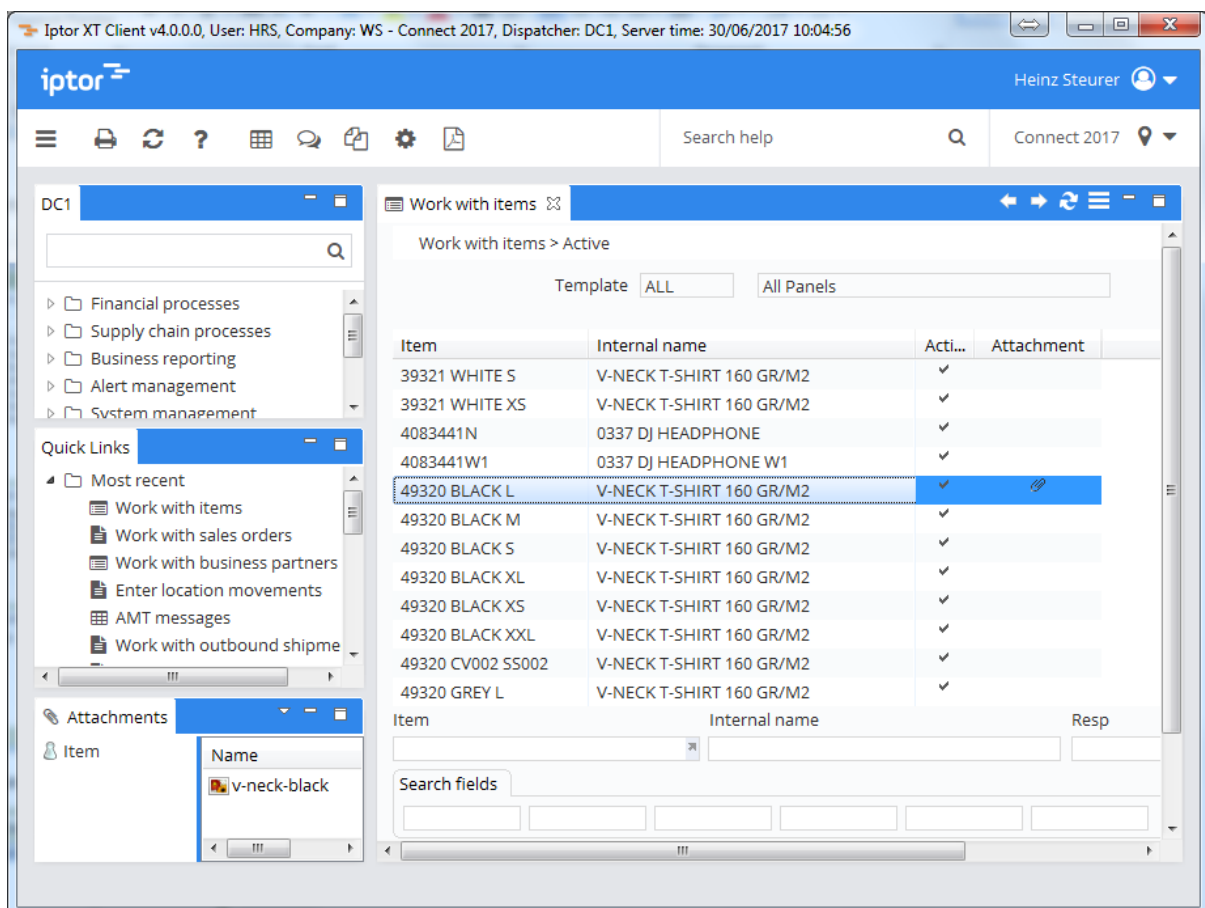
XT Attachments

General

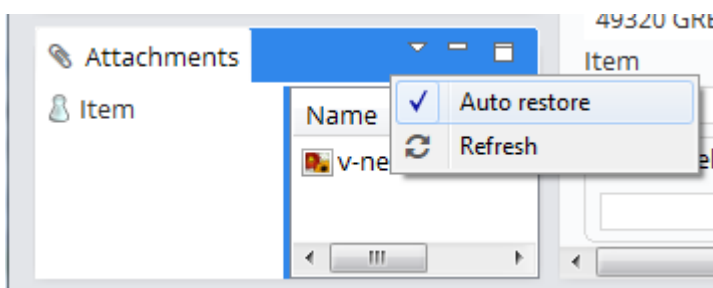
The XT Attachment view can be accessed clicking on the paperclip icon in the bottom-left corner. The icon is not visible if the attachments feature is not active.



The attachments view will automatically open if you click on a table row or panel with attachment capabilities.



You can switch off automatic pop up by unselecting 'Auto-restore' on the attachment view's menu.



Attachment Quick View

To view attachments you can double-click on the file in the attachments view. If you want attached images to be shown without having the attachments view open you can use the 'Attachment Quick View'. Go to the 'Views' menu in order to include this view in the workbench.

The screenshot displays the Iptor XT Client software interface. The title bar indicates the user is Heinz Steuerer, and the system is connected to Connect 2017. The main window is divided into several sections:

- Quick Links:** A sidebar menu listing various workbench functions such as 'Work with items', 'Work with sales orders', and 'Work with business partners'. The 'Attachment Quick View' is highlighted at the bottom.
- Attachment Quick View:** A panel showing two images of a t-shirt, one white and one black.
- Work with items > Active:** A table listing active items with columns for Item, Internal name, and Attachment. The item '49320 BLACK L' is selected, and its attachment is visible as a small icon in the 'Attachment' column.
- Search fields:** A section below the table with input fields for searching items.

Item	Internal name	Acti...	Attachment
39321 WHITE S	V-NECK T-SHIRT 160 GR/M2	✓	
39321 WHITE XS	V-NECK T-SHIRT 160 GR/M2	✓	
4083441N	0337 DJ HEADPHONE	✓	
4083441W1	0337 DJ HEADPHONE W1	✓	
49320 BLACK L	V-NECK T-SHIRT 160 GR/M2	✓	
49320 BLACK M	V-NECK T-SHIRT 160 GR/M2	✓	
49320 BLACK S	V-NECK T-SHIRT 160 GR/M2	✓	
49320 BLACK XL	V-NECK T-SHIRT 160 GR/M2	✓	
49320 BLACK XS	V-NECK T-SHIRT 160 GR/M2	✓	
49320 BLACK XXL	V-NECK T-SHIRT 160 GR/M2	✓	
49320 CV002 SS002	V-NECK T-SHIRT 160 GR/M2	✓	
49320 GREY L	V-NECK T-SHIRT 160 GR/M2	✓	