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2. Desktop Layout

2.1 Introduction

The Desktop layout is designed to maximise the speed at which transactions and user operations are performed. In order to achieve this, the Desktop provides:

- Direct navigation to menus containing the most heavily used products and transactions.
- Automatic data entry, wherever possible, using a scanning device such as a bar-code reader or magnetic card swipe.
- Alternative methods of manual data entry via touch screen and keyboard.
- Sufficient information to enable the user to complete an operation with the minimum of interaction with the system.
- Standard controls and functions.

This chapter describes briefly the main types of screens that make up the system, their function, layout and characteristics.

2.2 Screen types

The Horizon OPS Desktop contains the following main screen types:

- Menu screens

  Menu screens enable the user to select a product, navigate to another menu screen or to a transaction screen.

- User dialogue screens

  User dialogue screens enable the user to supply information to the Horizon system in order to perform a particular task. The user may simply accept the information that the screen displays, enter the quantity of the product that is being sold, or details of an account that is to be credited with a deposit. There are several types of dialogue screen; the format that is used depends on the data that is to be displayed or input.

- Report screens

  Report screens are a form of user dialogue screen but are specifically designed to enable the user to choose whether the selected report is to be printed or previewed on the screen, and other options. A report screen may be accessed directly from a menu button or via an input screen, if a date or other criterion has to be specified.

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2.3 Screen Design

Screens are designed according to the function that they are to perform.

The screen is divided into discrete areas or 'estates', which are used for distinct purposes. There are two main areas: the navigation estate is the top part of the screen and contains the navigation and other functions, and the real estate, which comprises the remainder of the screen and is available for displaying information, input areas and so on. Of the real estate, the right hand part is used to display context information on menu and report screens, but is available to be used in other ways for data input or information display screens.

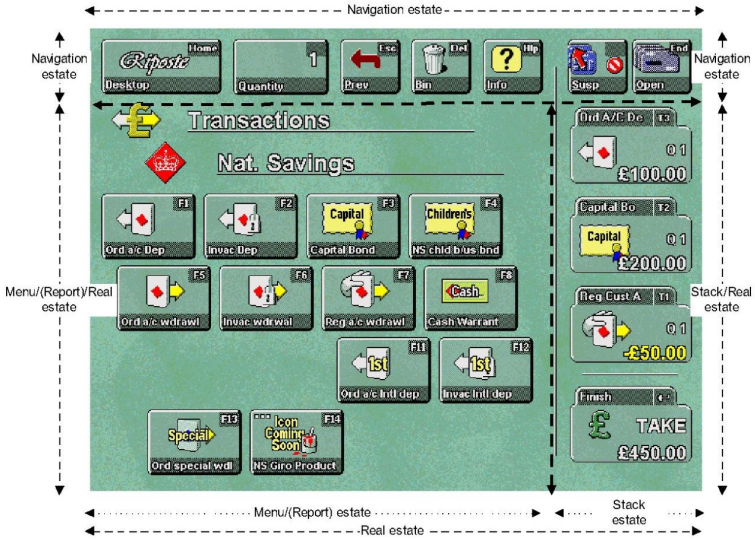

Figure 2-1 Screen estates

- The navigation estate comprises the top section of the screen and is displayed on all types of screen. The buttons within this area provide consistency for generally available commands to be activated. In addition, the navigation estate includes some function buttons such as the button to access Help information, and the Quantity button.

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- The menu estate — comprises the left-hand side three-quarters of the screen on menu screens. This contains up to sixteen buttons for navigating through the menu hierarchy and for selecting other menus, products and reports. On report screens this area contains an information panel and three or four option buttons.
- The stack estate — comprises the right-hand side quarter of the screen for menu and report screens, and other screens when it is necessary to display context information. If a current customer session is in progress, transactions are displayed here. Otherwise, the clock and date are displayed.
- The real estate — comprises the screen area below the navigation estate. On screens other than menu screens, it is available for displaying information to the user, input areas and additional options. An example is shown in Figure 2-3.

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OCXs

Screens are populated by screen objects (OCXs), which are combinations of panels and buttons.

Panels

Some types of panels are used to present information to the user and other types provide a consistent mechanism for the user to enter data.

Buttons

Buttons are labelled screen objects that react like push buttons when they are selected and enable the user to choose a specific menu, product, or course of action.

The various OCX types are available to application developers and ensure that a consistent style is maintained. For example, all the button styles in use have a predefined position for a caption, an icon and a function key label.

The following sections analyse the three types of screen listed in section 2.2.

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2.3.1 Menu Screens

Menu screens must be organised in a way that enables users to reach the required screen, product or function as rapidly as possible.

Menu screens are easily identified visually by the clear division of the screen into three areas: navigation, menu and stack estates, and by the indentation of the rows of menu buttons.

The type of menu is identified by the title lines. The current context is made obvious to the user by displaying the mode of the transaction at the bottom of the stack estate: 'Serve Customer' or 'Rem In Other PO', for example.

Figures 2-1 and 2-2 show examples of menu screens. Figure 2-2 is an example showing the display before a customer session has been started. Figure 2-1 shows a menu screen with an active transaction stack during a customer session.

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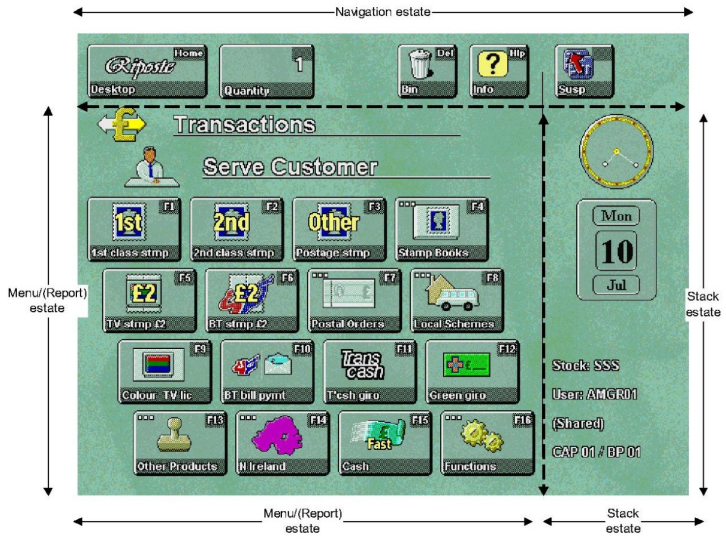

Figure 2-2 Menu screen with time and date displayed

The menu estate is laid out using a maximum of sixteen buttons, arranged in four rows of four, each indented slightly further from the left.

Detailed guidelines for designing menu screens and the hierarchy of menus are listed in Chapter 8.

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2.3.2 User dialogue screens

User dialogue screens must contain sufficient information for the user to perform a task without having to refer to other documentation. The order in which data is to be entered and the options that are available must be made obvious.

All input screens display the navigation estate, but the rest of the screen (the real estate) can be deployed in various ways, depending on which component types (OCXs) are used to build the screen.

There are several different formats that are used for screens, depending on the application that is being used. Chapter 3 describes the various formats and the guidelines that apply to each.

Simple dialogue screens are script driven; instructions to the user and data entered so far appear on the right of the screen, and the user enters or selects data on the left. The instruction on the right-hand panel, or a suitable contraction of it, appears as the caption for the input field so that it is obvious to the user which field is being updated. A purple arrow indicator points to the field that is being processed at the moment; the field itself has a purple halo. Figure 2-3 shows an input screen for a simple dialogue, Add User.

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2.3.2.1 Data input dialogue

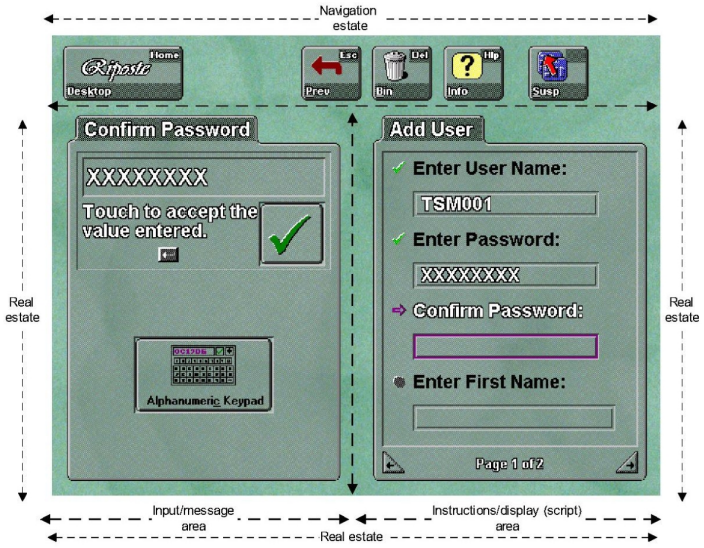

Figure 2-3 Data input screen

The purple arrow points to the field that is active, which is also indicated by a purple halo. The colour of the current instruction has changed to white from its dormant black colour. The caption of the input panel confirms to the user that 'Confirm Password' is the current activity.

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2.3.2.2 Option selection dialogue

For rapid data entry, option selection screens like the one shown in Figure 2-4 are used where possible.

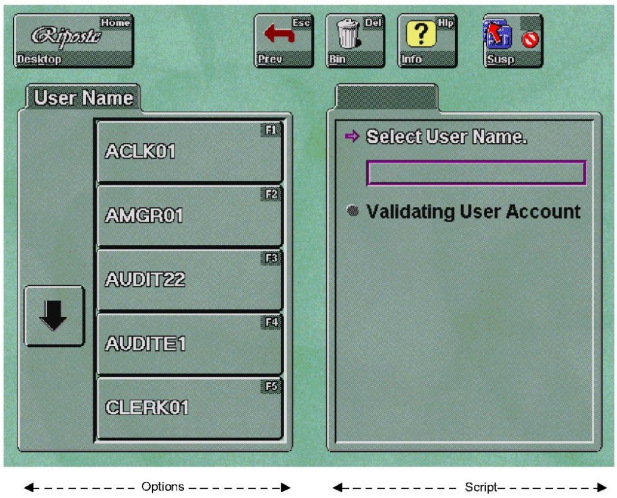

Figure 2-4 Option selection screen

To select an option, the user touches one of the buttons (or presses the equivalent function key). The black arrow points to further options on the next screen.

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2.3.2.3 Confirmation dialogue

When confirmation of an action is required, or there are alternative actions that the user can select, a screen like the one shown in Figure 2-5 is used.

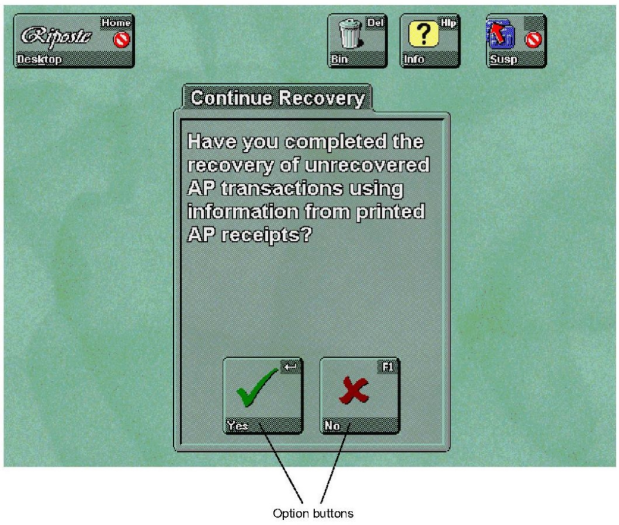

Figure 2-5 Confirmation screen

The user can decide to confirm that the operation is complete by selecting the 'Yes' option, or to continue by selecting the 'No' option.

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2.3.3 Report option screens

Report option selection screens present standard options to the user:

- Print - print the report on printer.
- Preview - preview the report on screen.
- Cut-Off (if applicable) - accounting period cut-off: reset the data after printing.
- Exit - return to the report selection menu.

Like menu screens, report screens are easily identified visually by the clear division of the screen into three areas. In addition to the navigation and stack estates, the area occupied by menu buttons on menu screens contains an information panel and three or four option buttons on report screens.

The screen shown in Figure 2-6 is for selecting report options. It is an example of an unscripted transaction. It displays information and gives the user various options.

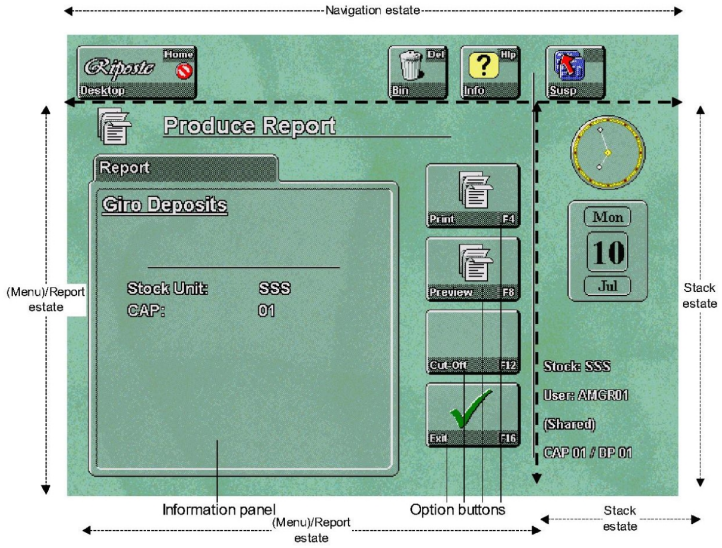

Figure 2-6 Report selection screen