Workspaces in Sage 200 - Best Practice Guide

2013 R2

Copyright statement

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Introduction

Sage 200 v2013 uses a new type of User Interface - workspaces.

These use Web technology making them available through the main application (on-line or on-premise), or via the Sage 200 Self Service website.

The workspaces replace the windows based Enquiry screens used in previous versions of the product.

You can open Sage 200 windows from workspaces to enter and process data, without having to go through the main menu.

Workspaces offer a lot of advantages over the enquiry screens, but as with anything new, it is important to understand how to get the best out of them.

This guide provides some suggestions for the best ways to use workspaces. There is also a tutorial section to help you learn how to use the Workspace Designer.

The references and examples in the tutorials relate to the demo data supplied with Sage 200.

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Differences between workspaces and the enquiry screens

Enquiry screens

The enquiry screens in previous versions of Sage 200 could not be customised to suit different users and tasks.

The enquiry screens opened with no data selected. Therefore, your first action was to select a record that you wanted to look at, such as a Customer, Supplier, Stock Item, Sales order and so on.

The methods available for selecting a record were limited. For example:

- You could only select a customer account using the Account Reference, the customer’s name or postcode.
- You could only select a stock item using the Item Code or Item Name.

Once selected, the enquiry screens only displayed data relating to that selected entity, i.e. that customer account or that stock item. If you wanted to see the data for a different customer or stock item etc, you had select a new record.

Workspaces

Workspaces can be edited by a user or a 'designer' . The workspaces display data as soon as they are opened, giving you access to many data fields straight away. This offers you many more possibilities for displaying information about the record or records that you wish to see.

When using workspaces, it is important that you enter some selection criteria (just as you did on the enquiry screens) to limit the number of rows displayed. With workspaces, however, you can select information on many different data fields.

You can select information based on a range of data. For example:

- You can select a range of customers based on an analysis code, such as all customers in **Region North**.
- You can select a range of stock items based on the product group, such as items in the **Accessories** group.
- You can select a range of sales orders based on their gross value, such as all orders over £2000.

You can use more than one field to select data. For example:

- All customers in a region with a balance greater than £3000.
- All stock items in the **Accessories** product group that have **mixer** in their name.
- All sales order lines for customer **James Backly** for **Paint** where the quantity ordered was more than 3.

You can also now see the data for more than one entity at a time for quick and easy comparison of key fields. For example:

- Show all sales orders lines for a stock item where the quantity ordered was greater than 50. This allows you to compare the unit prices charged for each line and for which customers.

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Best practice for using workspaces

Use these tips to help you to make sure that your workspaces meet your needs and provide the data that you require.

Changes can be made on two levels:

- As a user.

  A user can make some changes to a workspace, using the column selector and action selector. You can also change the type of chart and the data displayed in the chart on a workspace. These changes are saved for that user only.

- As a designer.

  If you have access to the Workspace Designer (controlled by a setting in System Administration), you can make changes for all users and for all workspaces that use a content part.

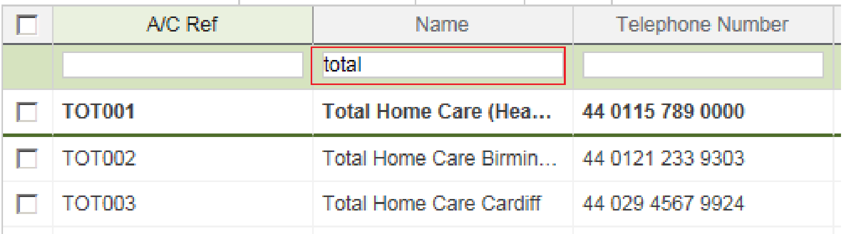
  If you want to edit one of the existing content parts, we recommend that you save the content part with a new name and add it to the relevant workspaces. This makes sure that you can always revert back to the default content parts if required.

Filtering data

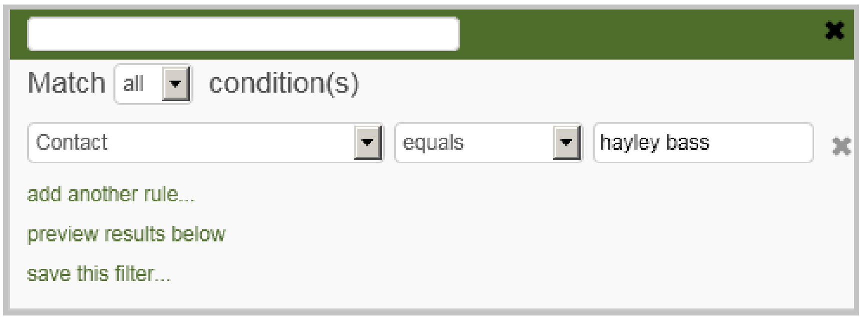
It is important that you filter the data that is displayed on a workspace. This makes it easier to find the data that you require. We recommend that you avoid scrolling a large list to find the data that you need.

Workspaces offer two different ways to filter the data rows displayed:

- Toolbar Filters - These are provided above each column. Use these to quickly find the record or range of records you want to see. They are not saved when you leave the workspace.



- Advanced filters - These can be set up for any column in a list, even if the column is not currently displayed. If you will use the filter more than once, give filter a meaningful name and save it. The filter will then be available every time you open the workspace. These are then very useful for when you need to filter the data by the same criteria regularly.



What can I do?	Why	Best Practice	How	
			User	Designer
Filter on a column using the quick filter.	The toolbar filters are useful when the selection criteria you need to enter is always different, or is something that you would not often need to enter.	Use quick filters for simple ad hoc filtering when the criteria changes regularly.	✔	✖

What can I do?	Why	Best Practice	How	
			User	Designer
Change the default filter operator for the toolbar filters	The tool bar filters are set to the following by default: ▪ Columns with text use **Contains**. ▪ Columns with numerical values use **Equals**. ▪ Columns with **Yes** or **No** values use a drop list. Make the toolbar filter more relevant to a specific task. For example, if you only ever wants to see transactions above a certain value on a workspace, change the default operator to 'Greater than'.	Change the filter operator when that data always needs to be filtered in a different way.	✖	✔ **Edit Content Part > List Definition > Filter**.
Create filters to be used by all users	Helps to find the information required for specific workspaces or tasks.	Set up advanced filters for criteria you will use regularly and when there are multiple columns of data required to filter on. Use quick filters for simple ad hoc filtering when the criteria changes regularly.	✔ **Filter > Create New**.	✖

Changing the displayed data (content parts)

The 'out of the box' workspaces have certain sets of data (content parts) included on each workspace. These are often linked to the record selected in the main list for a workspace. For example, the **Bank Account Enquiry** workspace has the these content parts; **Statements**,

Account Details, **Contact Details**, **Additional Email and Website Details**, **Memos** and **Attachments**.

You can choose which content parts are included on a workspace and the order that they appear.

What can I do?	Why	Best Practice	How	
			User	Designer
Add or remove content parts	It may be difficult to find the required data if there are too many content parts.	Choose the content parts that contain the most relevant information for the user or task. Remove any content parts that are not useful.	✖	✔
Change the order the content parts are displayed.	Make it easier to find the most important information.	Put the most important information at the top of the list of content parts.	✖	✔

Changing the displayed data (columns)

There are often many more columns of data available, but some may only be seen by scrolling to the right, some may be hidden completely.

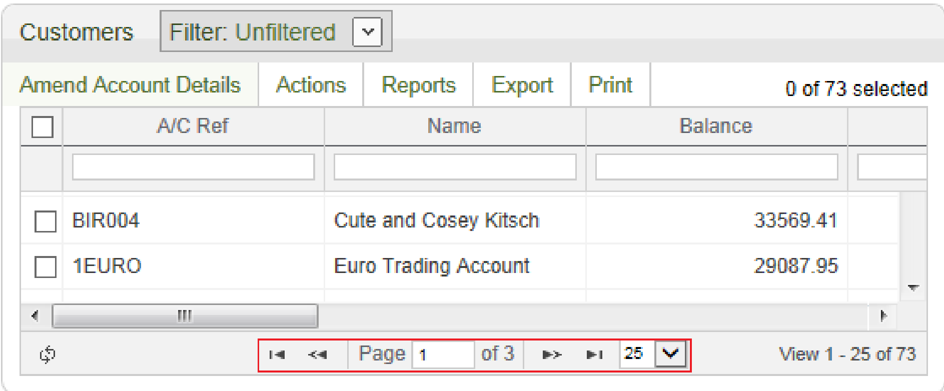
What can I do?	Why	Best Practice	How	
			User	Designer
Change the order the columns are displayed.	The fields that you want to see on a regular basis may not be visible by default.	Choose the columns that hold the data that you are interested in and sort them towards the left. Columns that you use to select the rows should always be to the left so that you can easily see which entity it is that you are viewing.	✔ Column Selector or right-click the column heading.	✔ **Edit Content Part > List Definition > Filter**.

What can I do?	Why	Best Practice	How	
			User	Designer
Change the column size	By default, the columns are wide enough to see as much of the data as possible. You can make columns wider or narrower. This change is remembered the next time you use that workspace.	Set the column widths to suit you data. You could make some narrower enabling more columns to be visible without scrolling.	✔ Grab the dividing line in the title bar and move it.	✖
Hide columns	Some data may only be seen by scrolling to the right. It may be difficult to find the most pertinent data if many columns are displayed.	Hide columns that are not used all the time to reduce the number of columns.	✔ Column Selector or right-click the column heading.	✔ **Edit Content Part > List Definition > Filter**.
Display columns	Some data may not be displayed on a workspace 'out of the box'.	Display columns required for a specific task.	✔ Column Selector or right-click the column heading.	✔ **Edit Content Part > List Definition > Filter**.
Remove columns	Some data that is not applicable to certain users may be displayed.	Remove columns from the content part to make sure sensitive company information is not available to all users.	✖	✔ **Edit Content Part > List Definition > Filter**.

What can I do?	Why	Best Practice	How	
			User	Designer
Change the column labels	By default the columns use the labels assigned to that data field. You can change the labels for each column in the Workspace Designer	Change the column labels to make the workspace relevant to your business	✖	✔ **Edit Content Part > List Definition > Filter.**

Changing the number of records displayed per page

When the data is loaded into the workspace, the results are paged. This means that the just one page's worth of data is requested from the server at a time. This is to make sure that the response is as quick as possible. As you select the next page the request is sent to the server for the next page of data.



You can choose up to many 500 rows per page. However remember, the more rows on a page, the longer it will take to obtain that data from the server.

What can I do?	Why	Best Practice	How	
			User	Designer
Change the number of rows per page.	You can control the amount of data that is displayed on a page.	Keep the number of rows per page small if you want a quick response.	✔ Select the required number of records per page from the drop-down list.	✖

Changing how the data is sorted

The data on the workspace is sorted by a specific column by default.

For example, the list of transactions on the **Bank Transaction Enquiry** is sorted by transaction date. You might want to change this to sort the list by bank account by default, or by bank account and transaction date.

A sort is applied to all data rows that meets your filter criteria, regardless of the number of pages of data included. If there are hundreds of rows, it may take some time for the data to sort. The sort order is remembered the next time you open that workspace.

What can I do?	Why	Best Practice	How	
			User	Designer
Change the sort order	Choose whether the column is sorted ascending or descending. You can change the default sort order in the Workspace Designer.	Always apply any possible filters to the data before sorting Choose the sort order that suits the task best.	✔ Click the column header.	✔ **Edit Content Part > List Definition > Sort**.
Choose the default sort	Choose how the data is sorted to display the most relevant order.	Change the default sort when the content needs sorted by a different column.	✖	✔ **Edit Content Part > List Definition > Sort**.

Changing the actions

By default there are many actions and reports available on each workspace, although you will only see the ones you are allowed access to.

What can I do?	Why	Best Practice	How	
			User	Designer
Add or remove actions	It is difficult to find the required action if the list is too long.	Choose actions that are specific to a task to reduce the number of actions in the list. Remove the actions that you will rarely use. Order the rest by how often you are likely to use them.	✔ Action Selector	✔ **Edit content part > Actions**
Add actions to the toolbar	You can choose to have actions available as buttons on the Toolbar at the top of the workspace.	Add those actions that you use all the time to the toolbar, to make them easier to find. Restrict the number on the toolbar to maximise the space for your data. If you have too many actions you will have two rows on your toolbar, limiting space for your data.	✔ Action Selector	✔ **Edit content part > Actions**

Changing the reports

By default there are many reports available on each workspace, although you will only see the ones you are allowed access to.

What can I do?	Why	Best Practice	How	
			User	Designer
Add or remove reports	Choose reports that are specific to a task to reduce the number of reports in the list. Choose the order reports are displayed to make finding the required report easier.	Order the reports by the ones most often used by the Users of the workspace. Remove those that are not going to be used at all.	✖	✔ **Edit content part > Reports**

Creating new workspaces

The 'out of the box' workspaces are designed to display a lot of data and can be used by many different users for many different tasks. These workspaces may not be suitable for specific tasks or your business processes.

You can create your own workspaces either from scratch or by amending the existing 'out of the box' workspaces.

What can I do?	Why	Best Practice	How	
			User	Designer
Choose the layout of the workspaces. This is the number of arrangement of the panels.	Choose the best way to display the data for the required task.	Avoid having too panels in a vertical list, as some panels may not be displayed on the screen without scrolling and therefore not seen by the users. If you want to display a large number of columns, use a layout where the panels are the full width of the workspace. If you want to display a large number of records (rows) but few columns, choose a layout with the panels side by side.	✖	✔
Choose a content part for the main list in the workspace.	To make sure that most relevant data is included.	Choose the content part that is most relevant to the task required and amend it so that the most important data is always visible.	✖	✔
Choose the other linked (child) content parts.	To make sure the relevant data is included.	Make sure you only include data relevant for the specific task. Amend the order the content parts are displayed so that the most important data is always visible.	✖	✔
Choose the required columns.	To make sure the required data is always visible and easy to find.	Remove columns that are not required or that the user should not access. Hide columns that are rarely used.	✖	✔

What can I do?	Why	Best Practice	How	
			User	Designer
Choose the required actions	To make sure that actions are easy to find.	Remove actions that the user does not need or should not access. Add common actions to the toolbar for quick access.	✖	✔
Choose the required reports	To make sure that the required reports are easy to find.	Remove reports that the user does not need or should not access.	✖	✔
Choose the users who can access the workspace.	To make sure that only the required users can access the workspace.	Create roles so that users can access the workspaces that they need.	✖	✔

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Tutorial

The following exercises are designed to walk you through some common scenarios for customising workspaces.

For detailed information on using the features and functionality of the Workspace Designer, please see the Sage 200 Help: https://support.sage.co.uk/help/sage200/help.htm.

Exercise 1 - Modify the content of a workspace

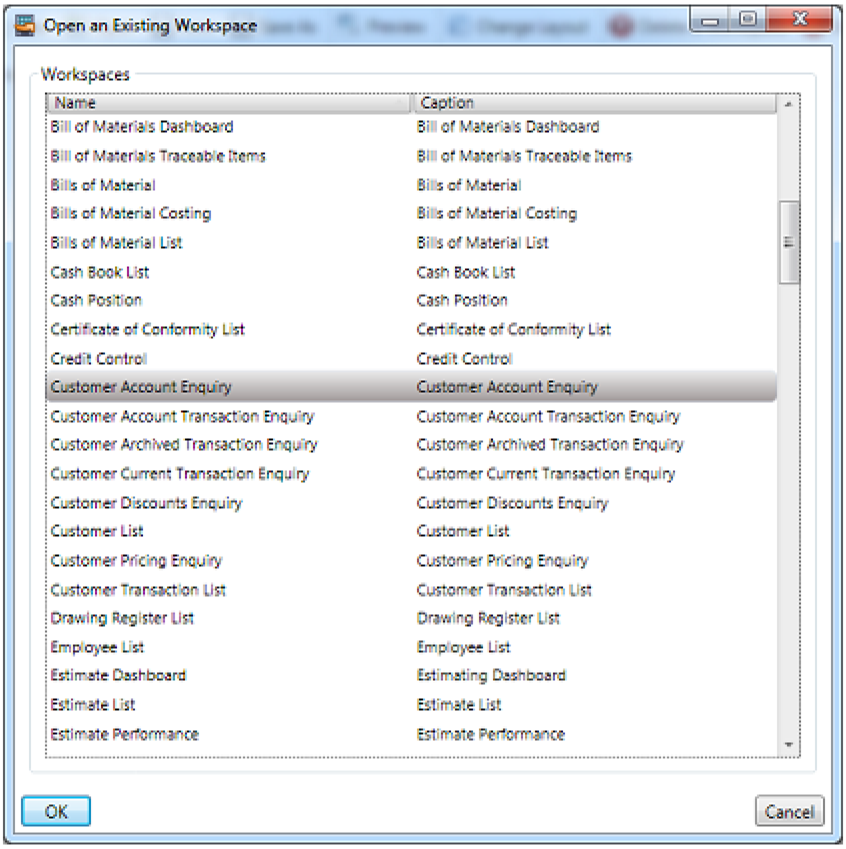
You are using the **Amend Customer Account Enquiry** workspace and feel that there are a large number of tabs. You want to remove those that are not used.

To do this, you must remove the content parts from the existing workspace and save it with a new name.

To do this:

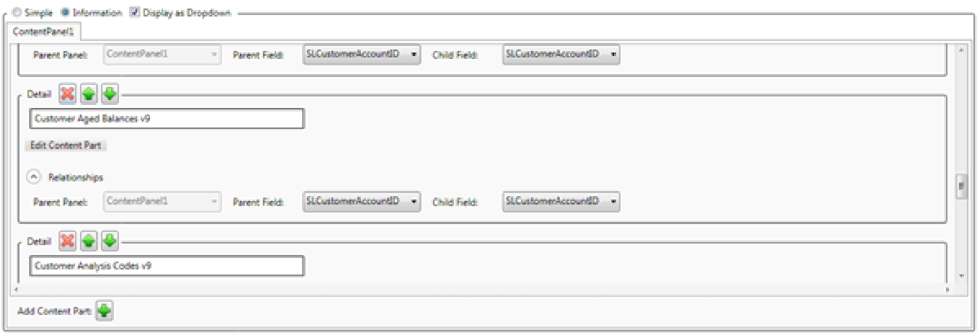
1. Open the Workspace Designer.
2. Select **Open**.

3. Select **Customer Account Enquiry**.



4. Click **OK**.

5. In the bottom panel, scroll down to the 'Customer Aged Balances v9' detail section.

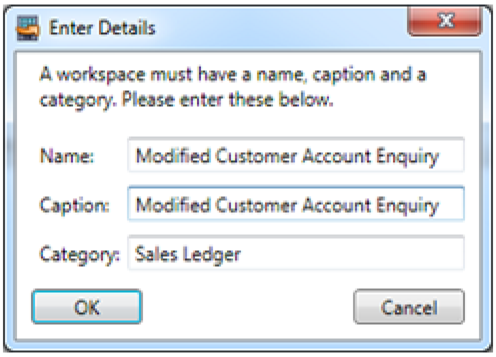


6. Click the  button. This removes the section.

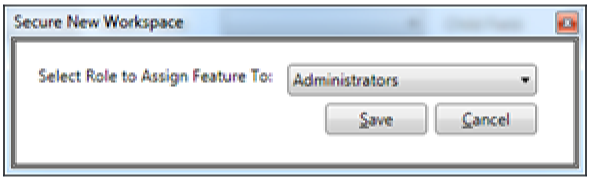
7. Repeat this for the **Turnover By Period** and **Turnover By Year** sections.

8. To save the workspace, click **Save As** on the top toolbar.

9. Enter a name for the new workspace such as **Modified Customer Account Enquiry**.

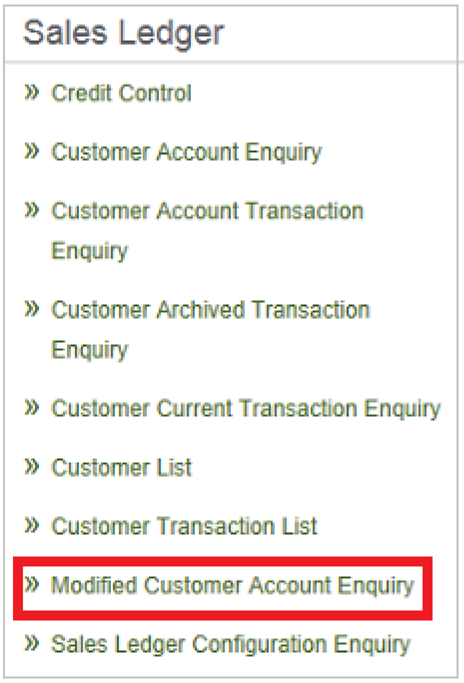


10. Click in the caption box to populate with the same name.
11. Leave category as **Sales Ledger** and click **OK**. A new workspace called **Modified Customer Account Enquiry**is then added to the Sales Ledger section of the drop-down menu.
12. Assign the workspace feature to a Role. This makes sure that the new workspace can be accessed by the correct users.



13. Click **Save**.

14. Return to the workspace list in program. The workspace should now be accessible in the 'Sales Ledger' section.



> You may have to click **Refresh** in the desktop toolbar before you can see the modified workspace in the list.

Exercise 2 - Modify content parts on a workspace

Now that you have created this workspace, you want to make some additional changes. In this example, there are actions relating to sales orders that are not used by most staff and the **Account Name** is used more than the **Account Reference**.

Remove some of the actions linked to Sales Orders from the customer list to make the remaining actions easier to find. Change the column that the customer list is sorted by to the **Account Name** as this is more useful.

Remove actions from a content part

1. Open the Workspace Designer.
2. Open the **Modified Customer Account Enquiry**.
3. In the top panel, select **Edit Content Part** to open the **Content Part Designer**.
4. Select the **Actions** tab.

5. Clear the **Select** check box for the following actions:
    - **Customer Discounts Enquiry**.
    - **Customer Pricing Enquiry**,
    - **Enter New Order – Full**,
    - **Enter New Order – Rapid**,
    - **Enter New Order – Trade**,
    - **Enter New Pro-Forma**,
    - **Enter New Quotation**,
    - **Enter New Quotation for Prospect**,
    - **Enter New Return**,
    - **Sales Document Enquiry**,
6. Click **Save**.

Change the column to sort on

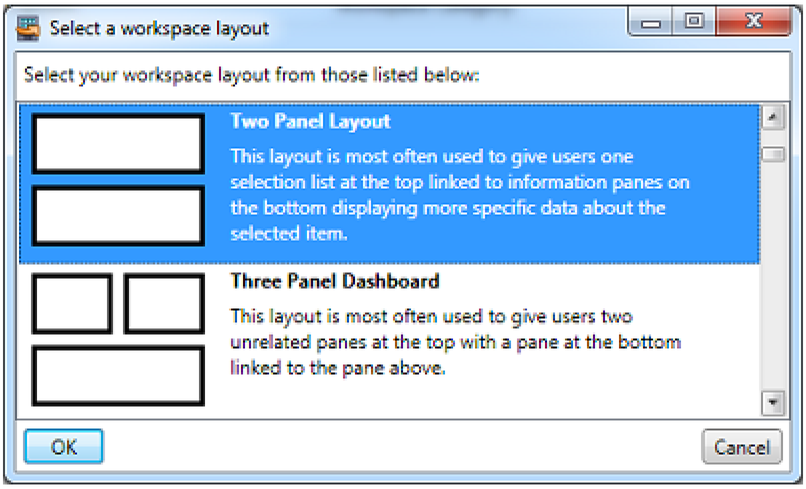
1. Within the same content part in the **Content Part Designer**, locate the **Sort** column.
2. Select *Ascending* alongside the **Name** column.
3. Select *None* alongside the **A/C Ref** column.
4. Click **Save**.
5. Open Sage 200. The workspace is now on the drop-down list.

Exercise 3 - Create a new workspace

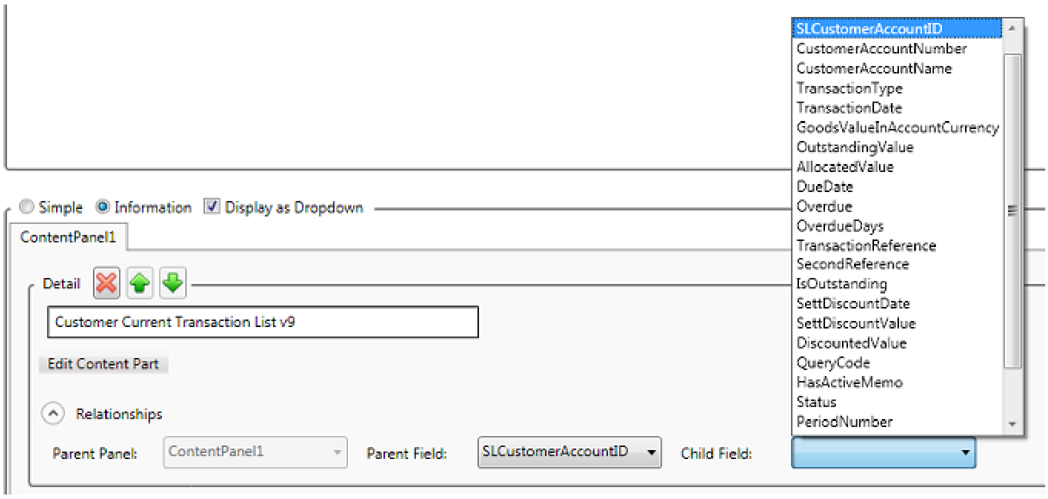
You would like a new workspace that shows the account and transaction details for a customer on a single workspace.

To do this you can create a new workspace to show the customer account details linked to current and archived transactions.

1. Open the Workspace Designer and select **New**.
2. Select **Two Panel Layout**.



3. In ContentPanel1 select **Customer List v9**. This is the content part that contains a list of all customer accounts.
4. In **ContentPanel2** change type from **Simple** to **Information**. Multiple content parts can only be added to **Information** panels.
5. Check **Display as Dropdown**. This displays the content parts in drop-down list on the workspace.
6. Click **Add Content Part**.
7. Select **Customer Current Transaction List v9**.
8. To link this to the customer list, set the Parent Field to **SLCustomerAccountID** and set the Child Field to **SLCustomerAccountID**.



9. Click **Save**.
10. Enter a name for the new workspace, such as **Customer Account Transaction Enquiry**.
11. Click in the caption box to enter the same name.

12. Enter a category of **Sales Ledger**. This adds this workspace to the Sales Ledger section on the workspace drop-down menu.
13. Click **OK**.
14. Assign a role to the workspace feature. This is to make sure that is can be accessed by the correct users.
15. Click **Save**.
16. Open Sage 200. You should see the workspace on the drop-down list.

Exercise 4 - Add a panel to a workspace

You want to add some additional functionality to the new workspace. An additional account detail panel would be useful so users can get summary account information at a glance.

Additionally, they process a large volume of online transactions. There is a requirement to produce frequent reports to analyse this information for a range of customers.

In this case, add an additional panel to show the account detail information. You also need to add the Online Transaction report to the Customer List panel.

Add a panel

1. Open the Workspace Designer.
2. Open the **Customer Account Transaction Enquiry**.
3. Select **Change Layout**.
4. Select **Three Panel Layout**.
5. In **ContentPanel3** change the type to **Information**.
6. Click **Add Content Part**.
7. In the **Detail** panel select **Customer General Information v9**.
8. To link this panel to the customer list, set the **Parent Field** and **Child Field** to **SLCustomerAccountID**.
9. Click **Add Content Part**.
10. In the **Detail** panel select **Customer Financial Information v9**.
11. To link this panel to the customer list, set the Parent Field and Child Field to **SLCustomerAccountID**.
12. Click **Preview** to review workspace.
13. The additional content parts are displayed collapsible panels. To change this to a drop-down list, click **Display as Dropdown** in **ContentPanel3**.
14. Click **Preview** to review the change.
15. Close the **Preview** window and click **Save**.

Add a report

1. In ContentPanel1 click **Edit Content Part** to open the **Content Part Designer**.
2. Select the **Reports** tab.
3. Select the **Select** check box for the '**Transaction Listing (Online)** report.
4. Select **Save**.
5. Open Sage 200. You should see the modified workspace in the drop-down list.

For more information about worksapces and the Workspace Designer, see the topics in the help system, by pressing F1 from the Sage 200 desktop, clicking **Help** within the Workspace or Content Part Designers, or open the help website: https://support.sage.co.uk/help/sage200/help.htm.