WORKSPACE PIPES

User guide
Version 1.0

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CONTENTS

PART 1

ACCESSING & SETTING-UP WORKSPACE SYSTEMS

SECTION 1

Installing Workspace

SECTION 2

Running Workspace

1.1 WORKSPACE – LOCATING THE SYSTEM

Workspace can be accessed in two different ways:
- (i)   Click on Start>>Programs>> Workspace
- (ii)   Double click the Workspace shortcut from the desktop

1.2 WORKSPACE- LOGON

When the system start a login screen is displayed.

Diagram 1.1

To Login Type your user name and password as provided by the system administrator. And then click the OK button. If the login is successful, the main workspace is displayed. If the login is not successful, a warning message is displayed and you are given two more chances to attempt login. If the login fails for the third time, the system exits.
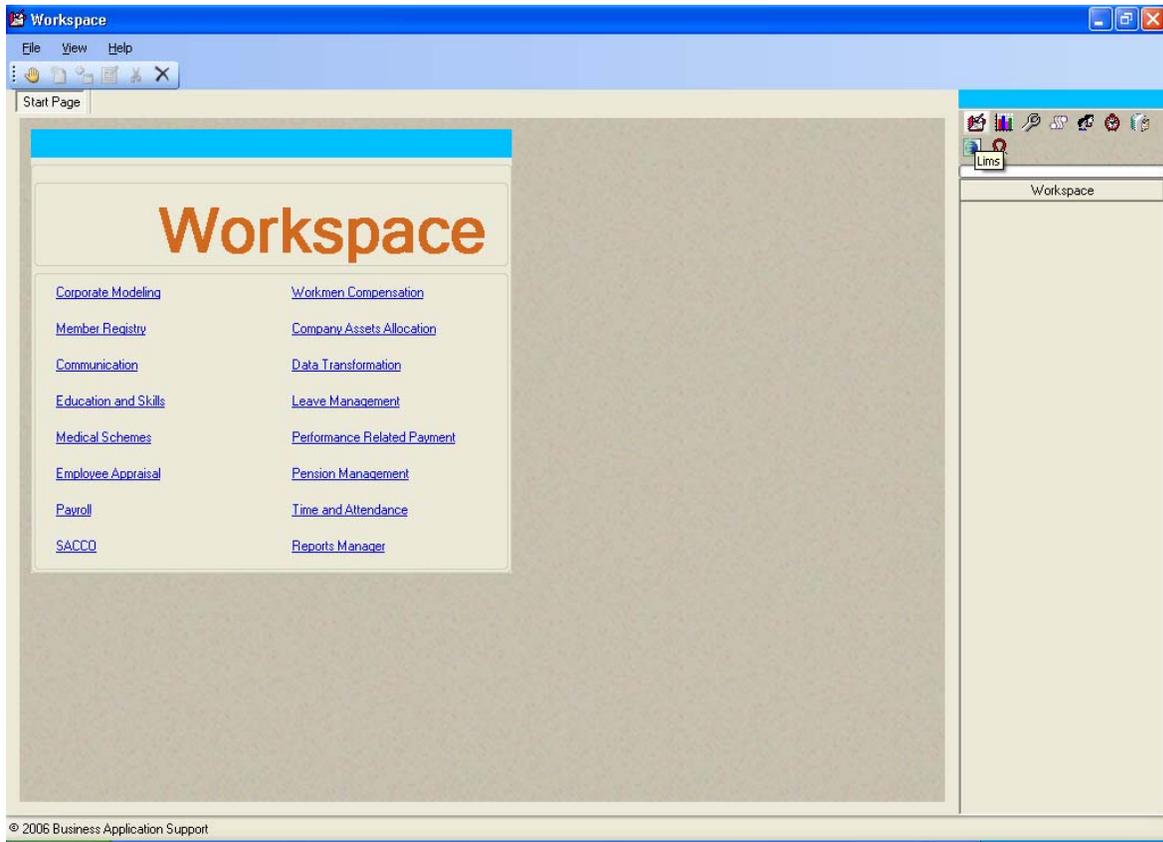
Diagram 1.2
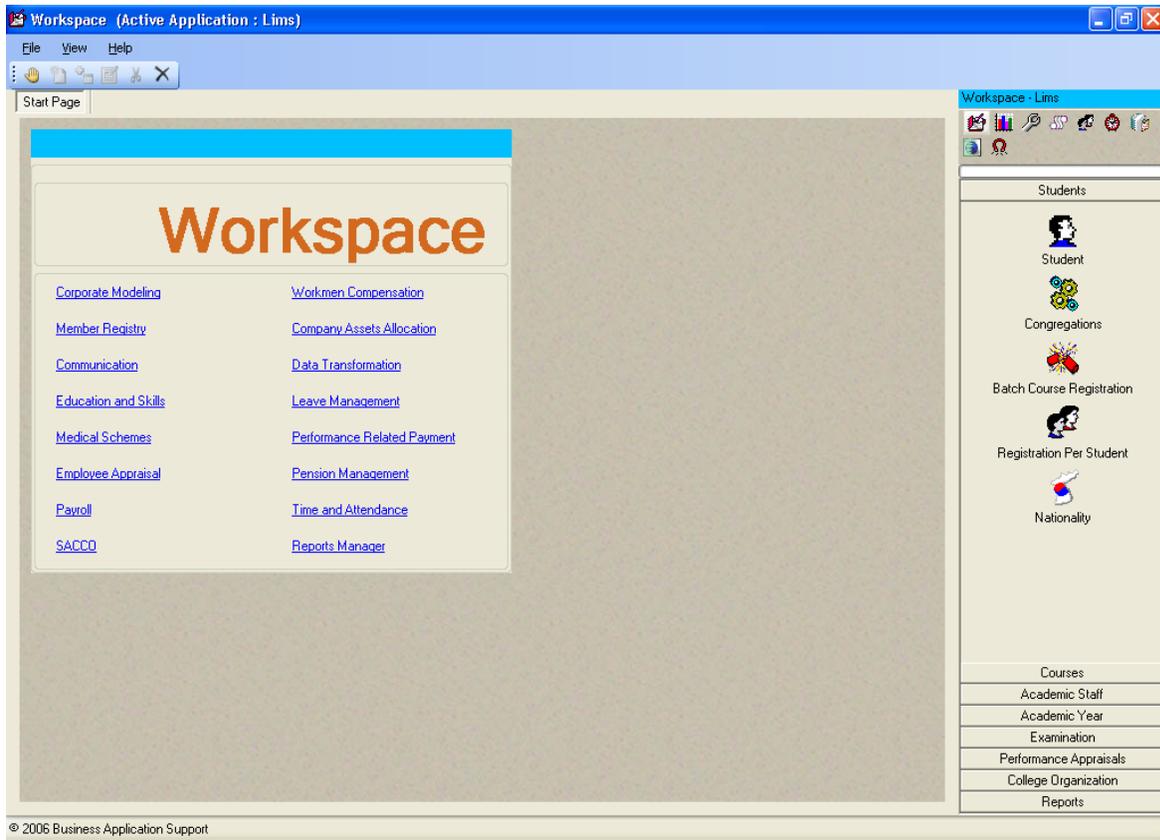
Diagram 1.3

1.3 MAIN WORKSPACE SECTIONS

There are 4 important functional sections on the main workspace window.
- (i)   The operations Toolbar
- (ii)   The Applications toolbar
- (iii)   The Commands Bar
- (iv)   The Resources List view

(i)   THE OPERATIONS TOOLBAR
The applications toolbar is used for the common database operations commonly refered to us CRUD. I.e. creating a record, Reading a record, Updating/Modifying a record, and deleting a record.

Apart from the function of reading a record which is done via the Resources List View, all other functions are accomplished using buttons on the main toolbar shown in diagram 1.4 below.

Diagram 1.3.1

Resting the mouse on each button displays a shortcut cue to the function of the button. From left to right, these button are:

- Application exit button
- New record button
- Add record button
- Modify record button
- Delete record button
- Undo changes button
- Close form button

(ii)   THE APPLICATIONS TOOLBAR

The applications tool bar shown in diagram 1.5 below is used to access the various applications in the Workspace suite. The number of buttons on the applications tool bar depends on the number of purchased applications. An application is activated by clicking its corresponding button. Resting the mouse pointer on a button displays the application name as the shortcut cue.

Diagram 1.3.2

(iii)   THE COMMANDS BAR

Once an application has been activated by clicking on the application toolbar as described in (ii) above, the Command buttons that help access the various functions of the application are displayed in the Command Bar. These commands are organized into logical groups, each having a header name. To access the command in a group, click the group header button. The first group's is commands are displayed by default whet the application if first activated.

Diagram 1.6 below shows the command bar for Workspace Lims.
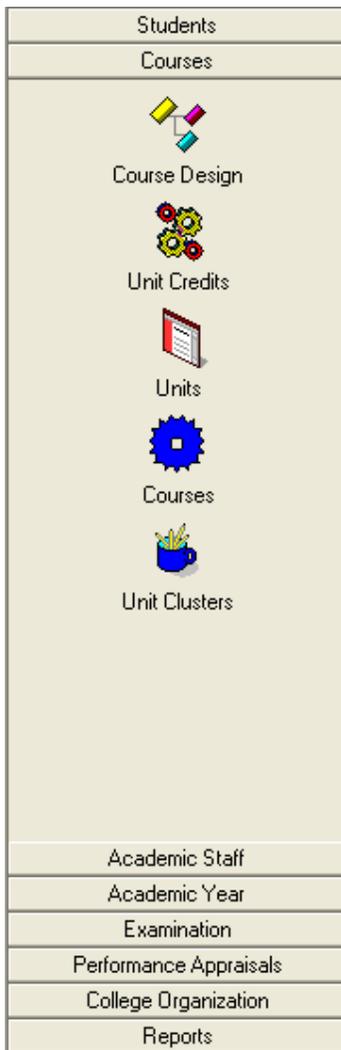
Diagram 1.3.3

(iv) THE RESOURCES LIST VIEW

The Resources List view is designed to enable users of the system to display and select the records to work with. It also enable the user to sort the records in order to find the records easily.

The Resource List View appears at the bottom of the screen under the main workspace. It consist of the main list view where records are displayed, and a query and sorting toolbar at the top.

Diagram 1.3.4 shows the Resource List View showing all the Corporate Ed's records

Diagram 1.3.4 – The Resource List View

Using the Resource List View to access Database Records

The Resource List View Columns are pre-set by the system. The user can however add or remove columns, change the column width, or add additional list Views

The Resource List View Header features the following toolbar items:
- (i) The Search Column Selector – Used to select the Column to search By.
- (ii) The Search Value Specifier - Used specify the Search Criteria
- (iii) The Find Button – Used to initiate the search
- (iv) The Sort Button – Used to sort the displayed records either ascending or descending
- (v) The Filter Button – Used to set the filter either on or off
- (vi) Structural Analysis Toolbar – This toolbar appears only when corporate Analysis is defined. When set, the toolbar provides more search criteria. For example, the user can decide to display only employees from a certain Branch, or Section
- (vii) Custom Analysis Toolbar – Like the Structural analysis Toolbar, this bar appears only when custom Analysis is defined. When set, it also provide more seach criteria.

Resource List View Usage Scenarios

Displaying All Record

- (i) Click on the Filter Button to display the selectors
- (ii) On the Search Value Specifier, type *
- (iii) Click on the Find Button to display the Records

Displaying Records where Column Value starts with specified Characters

- (i) Click on the Filter Button to display the selectors
- (ii) On the Search Column Selector, Select the Column you wish to search by.
- (iii) On the Search Value Specifier, Type the first few characters you wish to use as the search criteria. These characters are assumed to be the starting characters. E.G. Type M to search all records where the value of the specified search column starts with M
- (iv) Click on the Find Button to display the Records

SECTION 2

WORKSPACE SETUP

2.1 SETTING UP ADDITIONAL REPORTS GROUPS

Workspace functionality is organized into applications, which contains Command groups, which contains command Buttons. Each command button is used to activate a single functionality.

Workspace allow user to add command groups to applications. These command groups are however design to hold command buttons that activates reports only.

You can use this functionality to hold user defined reports that you wish to in-cooperate into the system.

Note: You can also use the Workspace-BI application to add user defined reports. The difference is the while Workspace-BI enables to keep report instance as history for future reference, reports added directly into the system are instantaneous – every time the report us run, it reads the database to refresh itself and present the most current state of the report data.

2.2 SETTING UP ADDITIONAL REPORTS ITEMS

2.3 SETTING UP REPORTS PARAMETERS

2.4 SETTING UP RESOURCES

2.5 SETTING UP RESOURCES DISPLAY DETAILS

2.6 SETTING UP ANALYSIS

Workspace is design with business analysis as one of the prime guiding pillars. Management want to understand their business. Top management need to understand the overall business labour cost. However middle level management need to understand their department, or section labour cost.

Apart from this structural analysis, management also want to design tailor made analysis parameters which enable them measure performance in certain key areas of the business.

Workspace is packaged with this in mind.

Workspace provides both structural and custom analysis features which, when well utilised provides management with well analysed reports. This, combined with the ability to design and attach user defined reports provides workspace with unrivalled capability to meet management requirements.

2.6.1: Structural Analysis

The term Structural analysis is used here to represent analysis that relies on the Organizational structure. Structural analysis in Workspace works in conjunction with the Corporate Modelling functionality.

The Corporate modelling functionality enable the user to define the organization structure in terms of branches, department, companies, sections, units , regions, etc.

Once set, the corporate model is then used by the Workspace Structural analysis facility to help the user analyse records of interest. However to enable this analysis, the various forms need to be made aware of the analysis structure – this constitute the Structural Analysis setup

2.6.2: Custom Analysis

PART 2

CORPORATE MODELLING

The Corporate Modelling module can be considered as the Workspace extended set-up function that enables you to customise how Workspace works for your organization. This extended setup prepares the ground for other modules for the following functions:

1. All Modules: Geographical Structure Analysis
2. Workspace Personnel: Setting Up Employees' grades, Assigning Functions and goals to employees, Job specification reports, positions setup, and staff evaluation

The Corporate Modelling functions are limited to those functions that deal with:

- The Corporate Geographical Structure
- The Corporate Functional Structure
- Corporate Calendar
- Corporate Goals
- Corporate Functions
- Corporate Tasks

The corporate structure function deals with the organizations structure in terms of its Geographical units and functional units. Functional units are the small teams established by the organization and charged with a set or corporate goals and functions that achieve those goals.

It is important to distinguish the geographical structure of the organization from its functional structure. An employee could be located at the Head office of an organization but he/she could be in charge of several organization units that are spread across the globe. An example could be the Corporate MIS Director. Such an employee could be located at the Corporate Head Office. However he is in charge or responsible for the overall MIS functions of the organization. A functional group can therefore exist across geographical boundaries.

The question therefore is, what corporate structure do you set up in Workspace?

Workspace users should be guided by their reporting requirements while determining the kind of structure to set. How do you find yourself analysing expenses? How do you analyse revenue? How do you allocate cost? Answers to these questions will provide a basis for setting the corporate structure.

Once the Functional structures are set, the next question to answer is who you find in these functional units. Who, in this case refers to positions. Positions will be designed by considering the functions that are allocated to the functional unit. A position can be found in different functional units of the same organization. For example you could find the Chief Account in the Mombasa Branch, and also in the Nairobi branch. Are these two chief accountants in the same position? At first these may be seen as different positions but when you consider the functions that each will be charged with and the organization goal they will be working towards, then the two positions are similar and can be considered as one position, existing in different functional units.

Workspace advocates creating one Position, and using it to model functional units or teams.

SECTION 3

3.1 USING WORKSPACE BI

The Workspace Reports Manager enables you organize your reports and access them from a single portal. The reports can be those generated by workspace or those generated by other applications such as your financial application. The reports manager is available as an independent solution when required for corporate reports management. The following functionalities are provided:

- Ability to create user defined Folders that help organize reports and reflect the Students grouping according to reports access rights
- Ability to create and attach user defined reports template.
- Ability to create and maintain online different instances of the same report. E.g. Debtors listing last week and this week.
- Ability to update the reports manager to keep the reports relevant
- A role based Folder and Reports access rights management capabilities

Accessing the Reports Archives:

(i)   To access Workspace BI Click on the Workspace BI button on the Applications Toolbar. Workspace BI is started.

(ii)   Click on the Reports Archive Button to start the Reports Archive. See diagram 4.2.1 below.
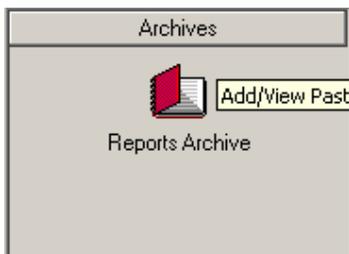
Diagram 4.2.1
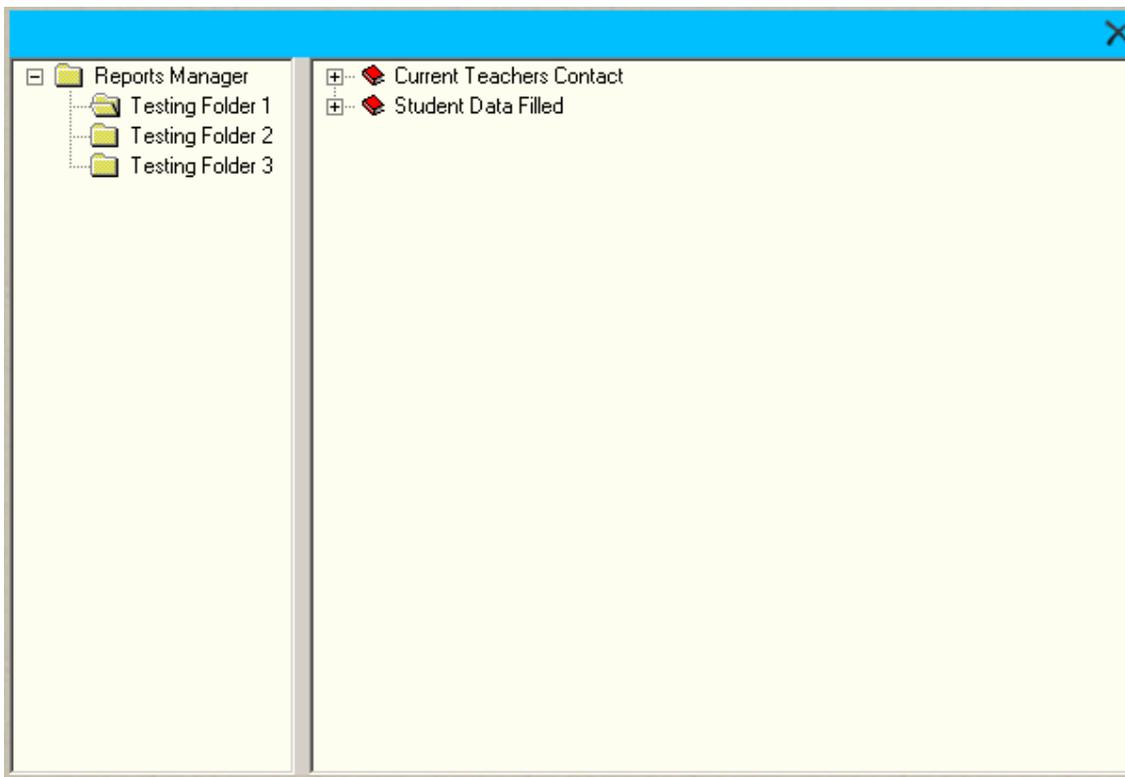
Diagram 4.2.2: Reports Archive Window

Adding a Folder

To add a folder:
(i)   Right click on the folders Tree view and select The New Folder from the context menu that appears. The Folders window appears
(ii)   Fill in the Folder name and click Ok. The New Folder is created

Adding a report to a folder

To add a new report to a folder:
(i)   Right click on the Reports Tree view and select New Report from the context menu that appears. The new report window appears
(ii)   Fill in the details for the new report. This involves selecting the report from the directory system and selecting the folder to host the report. Click OK when you through
(iii)   The new report is added to the selected folder.

Viewing a report

To view a report:
(i)   Right click a report and select refresh from the context menu that appears
(ii)   If the report requires parameters, the parameter window appears. Specify all the parameters and click ok.
(iii)   A new report instance is created under the report

(iv)   Select the newly created instance and click on the Preview the selected reprt button
        on the main toolbar
(v)   The report is displayed