Subject: Search and List ideas
Posted by stephenboey on Sun, 22 Feb 2009 21:17:45 GMT
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Tony,

I happen to find this feature quite useful in Siebel. Not sure if it is doable in Radicore, perhaps you might like it.

1. Is it possible to have a pattern like this
Goal: The user is able to search/filter for a list of results without going to another screen.

```
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|Search View |
--------------
|List View   |
--------------
```

2. Mass Update screen:
Goal: The user is able to search for a list of records and then perform an update on some field(s) on the list of records in the list of records returned (including those in other pages)

```
--------------------
|Update View       |
--------------------
|List View         |
--------------------
|Mass Update View  |
--------------------
```

Subject: Re: Search and List ideas
Posted by AJM on Sun, 22 Feb 2009 21:58:00 GMT
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1) I have the search criteria on a separate screen so that it does not take up space on the screen until it is actually needed. This allows me to have a whole screen of search fields available instead of just a single line of fields.

2) Updates to several records in a single screen are available in the MULTI2, MULTI3 and MULTI4 patterns.

Subject: Re: Search and List ideas
Posted by stephenboey on Sun, 22 Feb 2009 22:15:21 GMT
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>1) I have the search criteria on a separate screen so that it >does not take up space on the screen until it is actually needed. >This allows me to have a whole screen of search fields available >instead of just a single line of fields.

I meant, if the user requirement was to have this on the same screen, is this doable?

An example for this usage:
Sales Rep queries data in front of customer. Changing too many screens might not be ideal reason being he might forget his previous query or wishes to fine tune query with more criteria.

>2) Updates to several records in a single screen are available in >the MULTI2, MULTI3 and MULTI4 patterns.
I meant, the user requirement is to update all the records from one special view without checking the records on each the list view which could have more than 10 pages.

An example for this usage:
Sales Manager reassign several hundreds of records to their Sales Man. This feature helps them do this efficiently.

Don't get me wrong, just contributing some ideas.

Subject: Re: Search and List ideas
Posted by AJM on Sun, 22 Feb 2009 22:54:17 GMT
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(1) This is not available in any transaction pattern, and I have no plans to introduce it.

(2) Why won't one of the patterns I suggested work for you?

Subject: Re: Search and List ideas
Posted by stephenboey on Mon, 23 Feb 2009 13:27:10 GMT
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>>(1) This is not available in any transaction pattern, and I have no plans to introduce it.

I guess does take some effort.

>(2) Why won't one of the patterns I suggested work for you?
If the client are mid to big organizations, that is usually not acceptable. Too manual and tedious for day to day operations.

Subject: Re: Search and List ideas
Posted by AJM on Mon, 23 Feb 2009 13:48:36 GMT
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If you want to perform the same update on a large selection of records then take a look at the UPDATE2 and UPDATE4 patterns.

Subject: Re: Search and List ideas
Posted by AJM on Fri, 27 Feb 2009 14:47:30 GMT
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What exactly is the update you are trying to implement? You say you are trying to assign up to 100+ records to a salesman, but are all of these records already assigned to a different salesman? Do you want to transfer all records from salesman A to salesman B? Or do you wish to transfer just some of the records from salesman A to salesman B? Do you want to select the salesman first, then the records you want to associated with this salesman? Or do you want to select the records first, then choose the salesman?

Depending on your exact requirements the solution could involve different sets of transaction patterns.

Subject: Re: Search and List ideas
Posted by AJM on Sat, 09 Jul 2011 07:13:19 GMT
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stephenboey wrote on Sun, 22 February 2009 22:15
AJM wrote on Sun, 22 February 2009 21:58
1) I have the search criteria on a separate screen so that it does not take up space on the screen until it is actually needed. This allows me to have a whole screen of search fields available instead of just a single line of fields.

I meant, if the user requirement was to have this on the same screen, is this doable?

The ability to enter search criteria in a LIST screen without having to jump to a separate SEARCH screen has now been added to Radicore. See Title and QuickSearch Bar for details.