Sircon

Interview Configuration Interface
User Guide

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Authors:

Ryan Abbott
abbottry@msu.edu

Michael Gracik
gracikmi@msu.edu

Benjamin Split
splitben@msu.edu

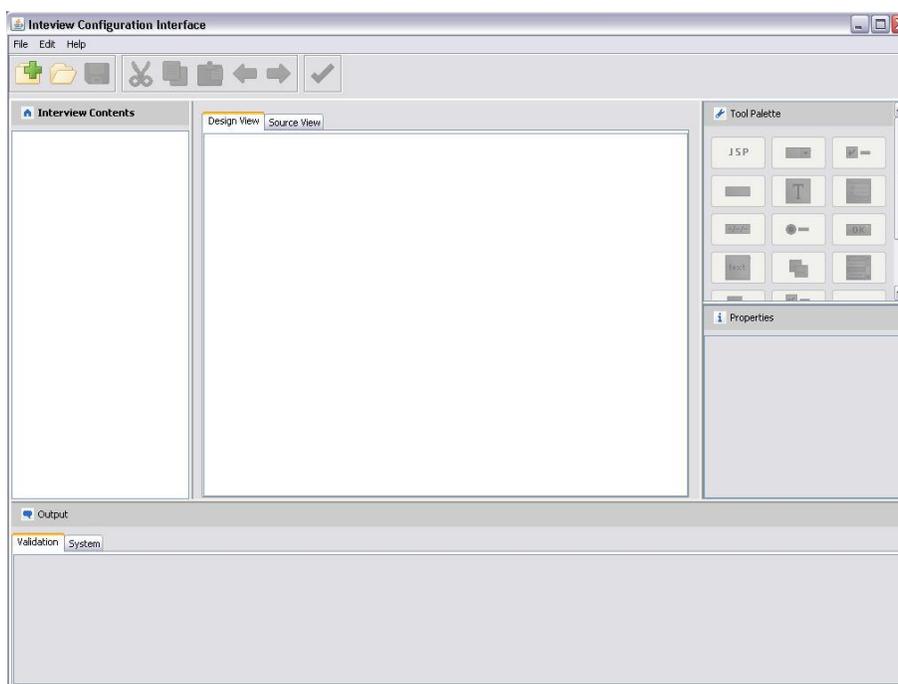Nicholas VanHowe
vanhowen@msu.edu

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1. Getting Started

1.1 What is ICI?

ICI stands for Interview Configuration Interface. It is an application that will allow rapid custom creation of XML files used to display the electronic forms of Interview applications for Sircon's customers. This application eliminates the need to 'hand-code' the files by allowing graphical design, but doesn't restrict the user from the old method.

The following is the overall design of the ICI application. Its toolbars and functionality will be described in Section 2.1 Design Components.

1.2 System Requirements

The following listing details the system requirements to run the Interview Configuration Interface. ICI also assumes the requirements to run the necessary software listed.
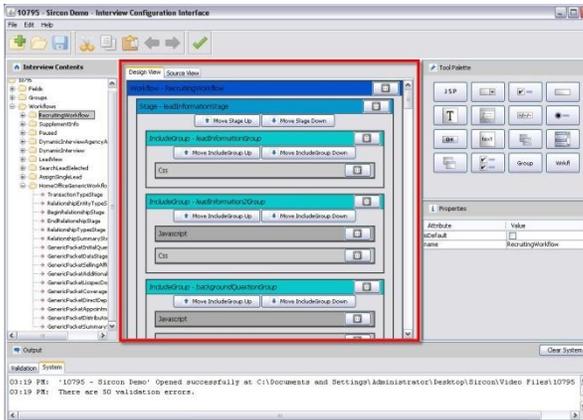
Operating System: Windows XP
Software Required: Java Runtime version 1.6

2. Using ICI

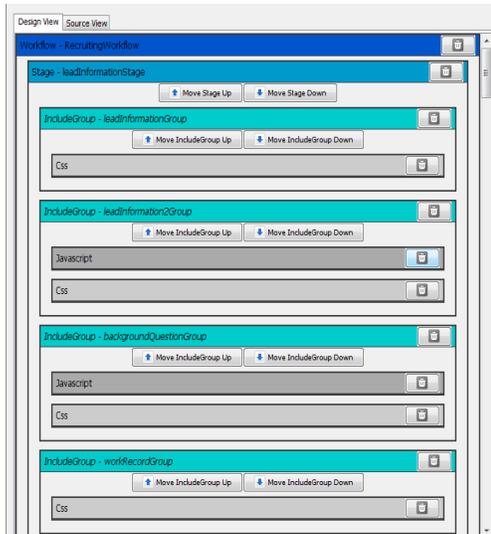### 2.1 Design Components

2.1.1 Workspace Area

The workspace area is central pane where a user can view spatial relations between objects graphically or edit the XML source of an interview element. This is the most vital and frequently used portion of the application.
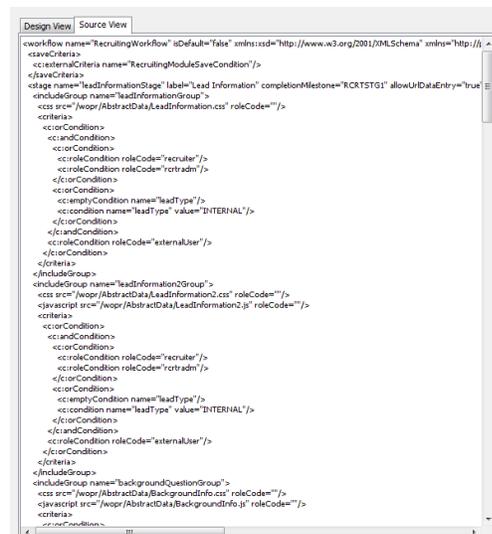

The workspace area is viewable in two views; Design View and Source View. The design view displays the elements defined in the XML files in a graphical version and will allow deletion and arrangement of field elements.

The source view will allow manual editing of the XML file. All changes made, will be saved in the appropriate XML components. It operates just like any text editor with cut, copy, and paste functionality.
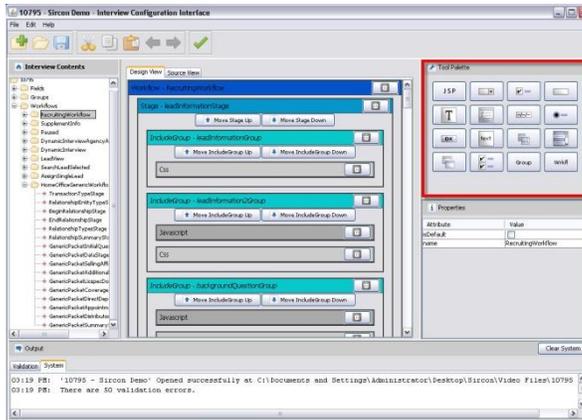
Design View   **Source View**

2.1.2 Toolbar Panel

The toolbar panel contains a collection of buttons that allow a user to easily add new interview elements. These items will be added to the tree and displayed in the workspace.

The toolbar contains all the field elements that are able to be added to the interview. As shown, the tool palette will dynamically resize to its viewing pane. Upon selection of an item, a box will appear to name the item and will then be added and selected in the tree.
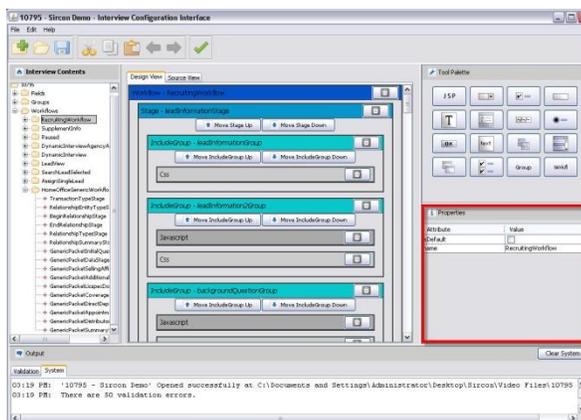

2.1.3 Properties Panel

The properties panel displays a table of properties that will allow a user to edit specific interview elements. The attributes displayed are specific to the component in view.
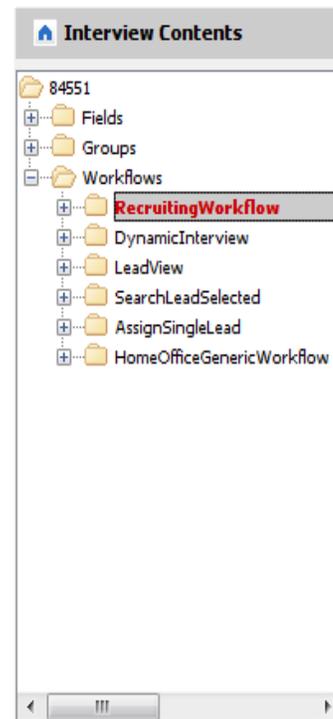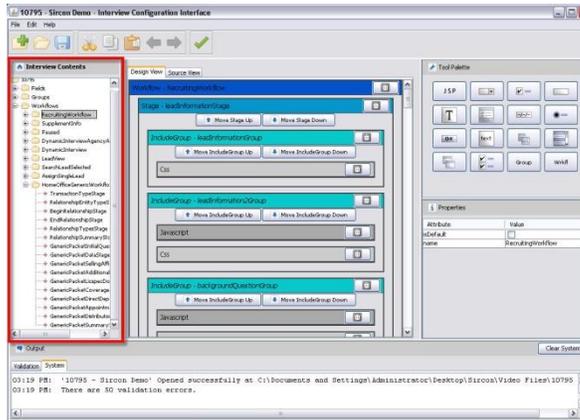
The properties elements are retrieved from the item selected and dynamically populate the table. As you can see, the table will expand and display only relevant attributes to the selected item.

2.1.4 File Tree

The file tree displays the all of the interview elements and their relative groupings. It is used to navigate between interview elements as well as select individual components

The file tree shows all of the field elements as well as the logical relations between them. It shows the hierarchy of Workflows to Stages, Stages to IncludeGroups, Groups to Subgroups, and Subgroups to IncludeFields. All the fields are displayed at the top in folder called Fields.

When a user clicks on a specific element, the element will be displayed in the workspace panel as well as have its attributes populated in the properties panel. When a change is made to any item, the elements name will be displayed in red to identify what elements have been added and all of the changes that have been made since the last save.
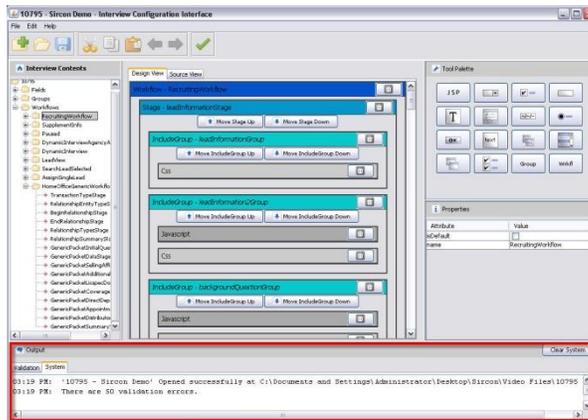
2.1.5 Toolbar

The toolbar provides quick access to the commonly used features. It contains buttons to create, open and save customers, standard editing actions, and most importantly, a button to validate the XML files.

2.1.6 Debug Panel

The debug panel is multi-tabbed pane which displays message from ICI. This component will output any errors found with invalid interview elements and important system messages. It is designed to keep the user informed of errors and successful commands and application operations.

The debug panel shows all the messages created by the ICI application. There are 2 tabs; Validation and System.

Validation displays all errors created when ICI performs validation. A table lists where the error occurred, the error and the element.

The System tab will print useful messages when the system performs specific operations and the time the operation was executed. It will state the number of errors found when validating and also messages including when file operations succeed or fail.

Validation

System

2.2 New and existing projects
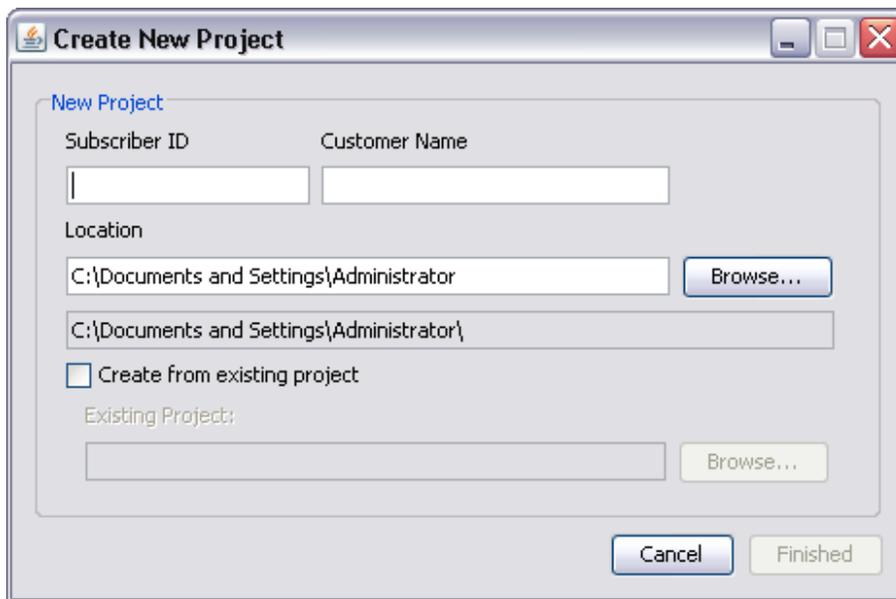
2.2.1 Creating a new Customer

To create a new customer choose File > New Customer,
or by selecting the 'New Customer' button on the toolbar.

In the displayed form, fill in the following:

Subscriber ID: Specifies the unique identification number
corresponding to the customer.
Customer Name: Specifies the name of the customer.
Location: Specifies the directory for the project to be saved.

To create a new project from an existing project select the checkbox marked 'Create
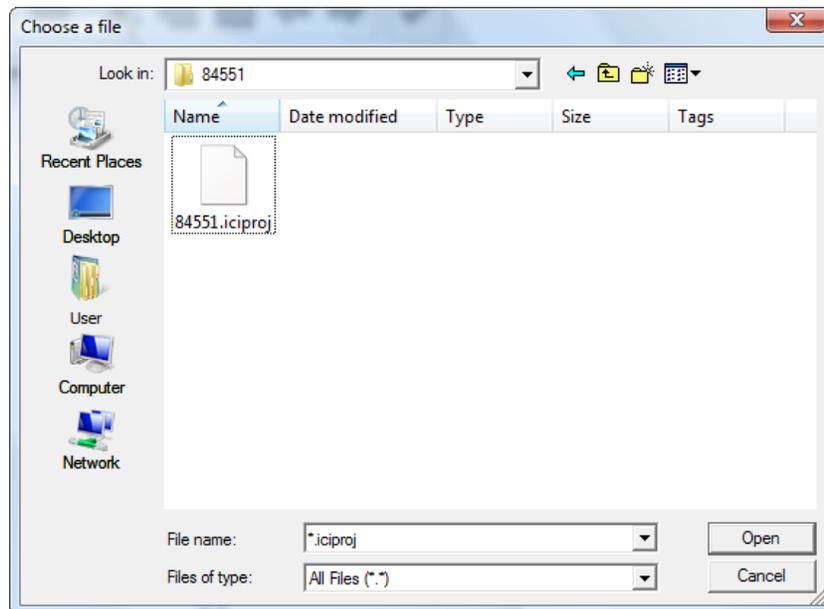from existing project'. Then fill in the following:

Existing Project: Specifies the directory for the existing project you want to
use as a template for the new project.

When the form is completed, press 'Finished' to create your project.

2.2.2 Opening

To open an existing customer choose File > Open Customer,
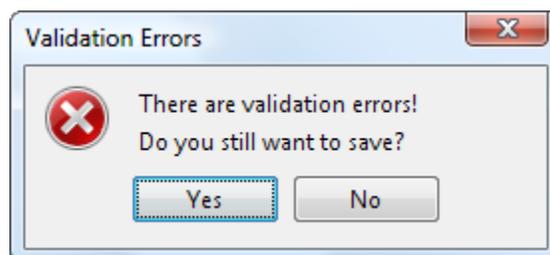or by selecting the 'Open Customer' button on the toolbar.

Opening a project is as simple as selecting the file you would like to open.
Using the file chooser, navigate to the directory of the .iciproj file you wish to open. Select the file and press 'Open'. The project will be loaded.

2.2.3 Saving

To save a customer project choose File > Save Customer,
or by selecting the 'Save Customer' button on the toolbar.

If validation errors are present when saving, ICI will prompt the user about the errors
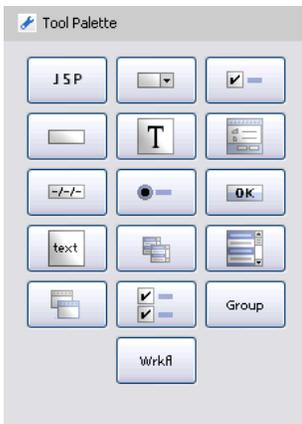and ask if they would still like to save.

The program will automatically ask the user to save, if they attempt to quit the program
without properly saving their project before exiting.
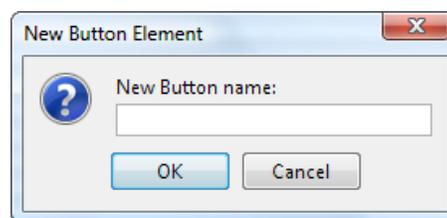
3. Project Manipulation

3.1 Adding elements

Adding elements can be performed in various different ways. There are not multiple ways to add the same item, but different ways to add elements for different uses; creating new items, and referencing them.

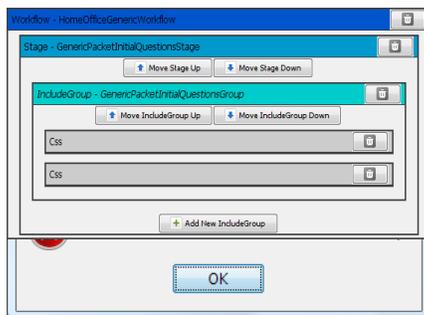### 3.1.1 Adding new field elements

To add a new element, press any button in the Tools Palette. ICI will prompt the user to name the element. Once a name has been entered, press OK. The new element will be created and selected in the File Tree.
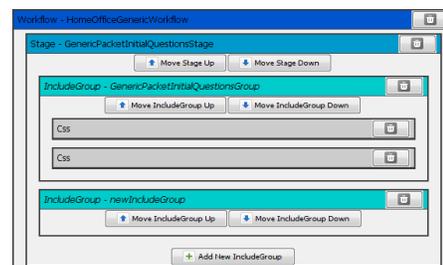
3.1.2 Adding include field elements

To add items to parent containers such as Groups and Workflows, there are buttons added to Design View. They are only added here, because they are not new. They include the element as a reference.

To add an element as a reference, the element must already exist. To add it to a specific container, navigate to the desired parent element and click 'Add new Include…' button.
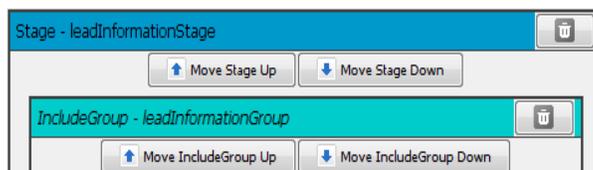
If there element doesn't exist, an error will display and inform the user to enter an existing element.

As you can see, when correctly referenced, the item will be appended to the button of the displayed container.

3.2 Moving elements

There is great need to move elements around within a Workflow or stage to re-organize the structure of an interview, or to move a newly created element into its correct position. To change an items position, the parent container must first be selected.

As seen here, there are buttons within movable components to change its relative position.

Once an item is moved, ICI will automatically update the XML code and redisplay the modified organization on the design view.

3.3 Deleting elements

As items are no longer needed, they may be removed from the interview. As shown in the above picture, on the left side of the title bar for an element, there is a remove button, pictured as a trashcan for this purpose. The user must be careful when deleting an item, because it drastically affect the organization of the interview, or not completely delete the item they intended to remove.

When viewing the organization of data, such as in Workflows and Groups, it is important to remember that an 'Include' element is not an instantiable element. When an 'Include' element is removed, only that specific reference is deleted. The item still exists in the Fields folder. This is used because fields may be and commonly are referenced multiple times in different interviews.

To delete an element entirely from the interview, the user must delete the actual element and not an 'Include' reference.