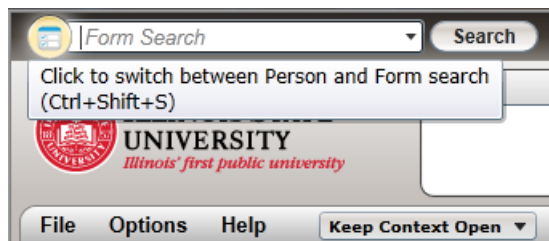


Searching and Favorites in Datatel Web UI 4.3

Search Field

The Search field uses icons and text prompts (see Figure 1) to switch between Person Search and Form Search. You can click the icon to the left of the search text box to switch between searching for a person (human figure icon) or a form (computer screen icon). You will use the Form Search for nearly all Datatel financial activity.

Figure 1: UI Search Field



LookUp Search Results

After you have selected and opened a form, the **Search Results** panel allows the flexibility to view things like vouchers, account numbers or purchase orders in a card view (see Figure 2) or grid view (see Figure 3). The grid view allows sorting on any column of data that is displayed.

Figure 2: UI LookUp Search Results – Card View

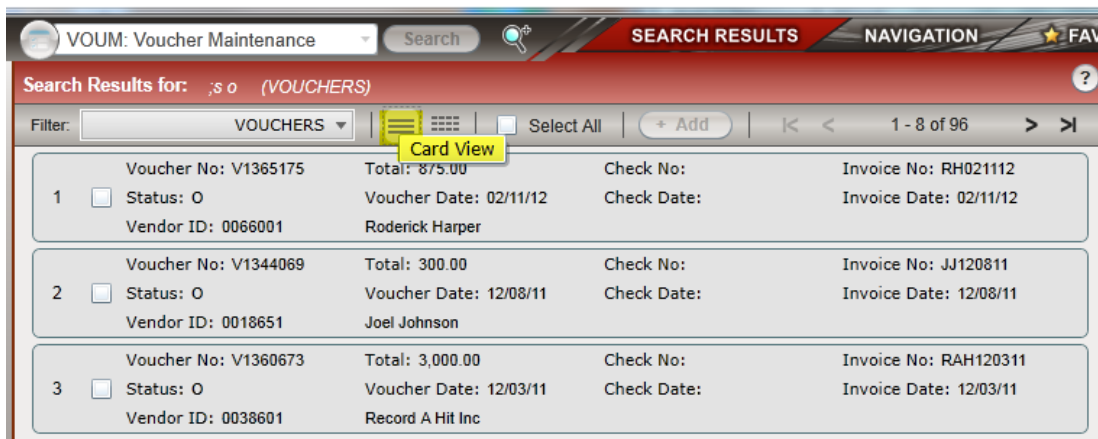


Figure 3: UI LookUp Search Results – Grid View

Search Results for: :s o (VOUCHERS)

Filter: VOUCHERS Select All + Add 1 - 20 of 96

#	Voucher Number	Status	Vendor	Grid View	er Total	Voucher Date	Vendor Name	Che
1	V1365175	O	0066001		875.00	02/11/12	Roderick Harper	
2	V1344069	O	0018651		300.00	12/08/11	Joel Johnson	
3	V1360673	O	0038681		3,000.00	12/03/11	Record A Hit Inc	
4	V1364506	O	0065958		1,800.00	12/03/11	Michael Palascak	
5			0060411		350.00	12/03/11	Brandon Williams	
6			0018651		300.00	11/17/11	Joel Johnson	
7			0047799		3,500.00	11/05/11	Rubber Room INC	
8			0008543		1,500.00	11/04/11	Auburn Moon Agency	
9	V1344620	O	0065333		1,950.00	11/04/11	Ben Truman	
10	V1358654	O	0000592		80.00	11/03/11	Rickie A. Johnson	
11	V1360670	O	0026128		4,500.00	11/01/11	Campus Speak Inc.	
12	V1365147	O	0060411		3,000.00	10/29/11	Brandon Williams	
13	V1343902	O	0046301		1,175.00	10/26/11	Timothy J. Mooney	
14	V1359028	O	0031429		2,850.00	10/26/11	Kramer Entertainment Agency In	
15	V1364534	O	0004934		1,247.62	10/19/11	Suzi Davis Travel Ltd	
16	V1364542	O	0004934		623.30	10/19/11	Suzi Davis Travel Ltd	
17	V1364564	O	0005191		53.45	10/19/11	Waddell Inc	
18	V1364620	O	0006788		907.47	10/19/11	NCI Business Systems Inc	
19	V1364646	O	0062678		330.00	10/19/11	Jim Yarbrough	
20	V1364666	O	0004934		302.80	10/19/11	Suzi Davis Travel Ltd	

Export all search results to a spreadsheet

0 selected Select # Open 1 - 20 of 96

Sorting Results

In Grid View, you can sort the search results by any available column. Click once on a column header to sort the results by that column in ascending order (low to high or alphabetical), then click the column again to sort the results by that column in descending order (high to low or reverse alphabetical).

Exporting Records

To export search result records to a Microsoft Excel spreadsheet, click the **Excel** icon (to the left of the Select # field). All search results records are exported to a spreadsheet. If the browser does not automatically open the spreadsheet, you are prompted to open or save it. When the export is complete, you can close both the informational window and dialog box.

Selecting Records

To select a record to work with, click anywhere on the row for that record. When you click anywhere on a row, the color changes to indicate that it is selected. A triangle also appears in the left column to indicate that it is selected. Double-click on a single record to select and open it. To select multiple records in sequence, click on the first record you want and then Shift+click on the last record in the sequence. To select multiple records that are not in sequence, click on the first record you want and then Ctrl+click on the other records. You can also enter the numbers of the records you want to select in the Select # field, separated by commas for individual record numbers. Use a dash to enter a range of record numbers.

Click **Select All** to select all records shown in the search results. This option selects all pages of search results, not just the current page of results.

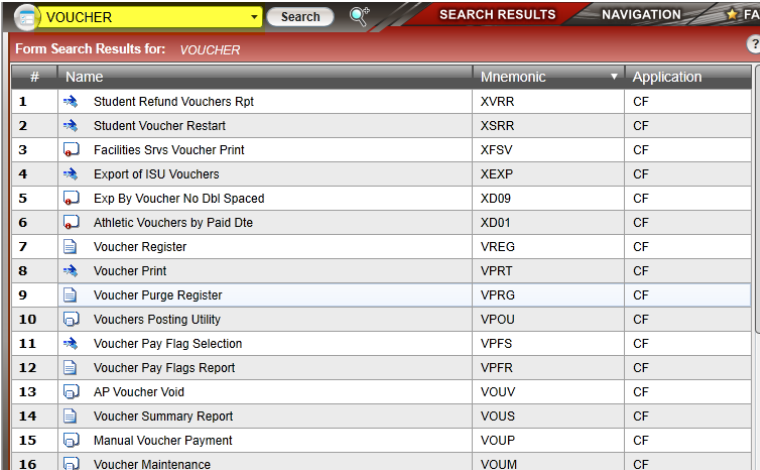
Form Search

When you search for a form, the search results show all records that match the search criteria you entered.

The results are displayed in Grid View, with the results in rows and columns. Icons also indicate the type of form (maintenance, inquiry, report, or procedure). You can sort the results on any available column. You can resize the columns if needed, and you may have to scroll horizontally in the **Search Results** panel to see all available columns. In most cases, when you enter a mnemonic in the form search text box, that form appears right away and the search results are not shown.

If you enter a word or part of a word in the title of a form, the **Search Results** panel shows all forms that match the criteria entered (see figure 4).

Figure 4: Mnemonic search results



#	Name	Mnemonic	Application
1	Student Refund Vouchers Rpt	XVRR	CF
2	Student Voucher Restart	XSRR	CF
3	Facilities Srvs Voucher Print	XFSV	CF
4	Export of ISU Vouchers	XEXP	CF
5	Exp By Voucher No Dbl Spaced	XD09	CF
6	Athletic Vouchers by Paid Dte	XD01	CF
7	Voucher Register	VREG	CF
8	Voucher Print	VPRT	CF
9	Voucher Purge Register	VPRG	CF
10	Vouchers Posting Utility	VPOU	CF
11	Voucher Pay Flag Selection	VPFS	CF
12	Voucher Pay Flags Report	VPFR	CF
13	AP Voucher Void	VOUV	CF
14	Voucher Summary Report	VOUS	CF
15	Manual Voucher Payment	VOUP	CF
16	Voucher Maintenance	VOUM	CF

If a mnemonic exactly matches the form search term entered, that form opens.

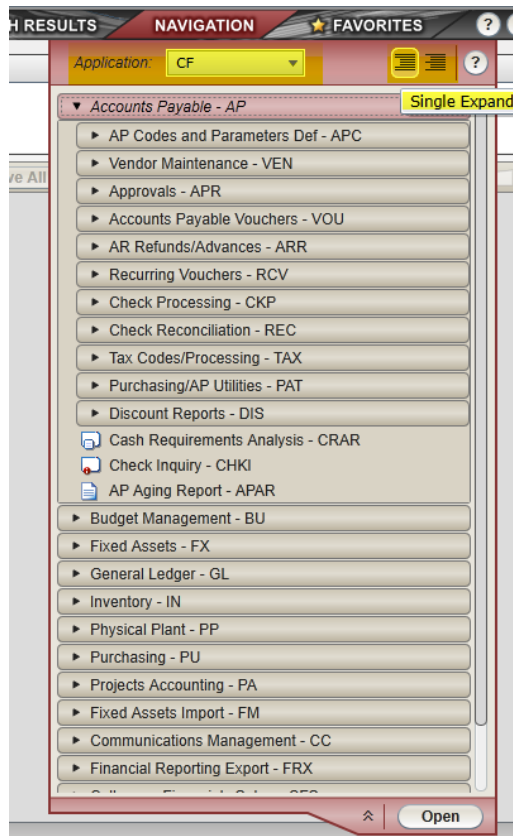
Figure 5: Search for specific mnemonic



Navigation Panel

Use the **Navigation** panel to locate a Datatel form by navigating through the menu structure. The **Navigation** panel shows all menus and forms that you are able to access in Datatel. To access the **Navigation** panel, click the **Navigation** tab. See figure 6 for an example of the **Navigation** panel.

Figure 6: Navigation Panel



Select the application you want to work with from the application drop-down list at the top of the **Navigation** panel. When the menus load, click on a menu to expand it. Menus can include other menus, so you can continue to expand them until only forms are listed.

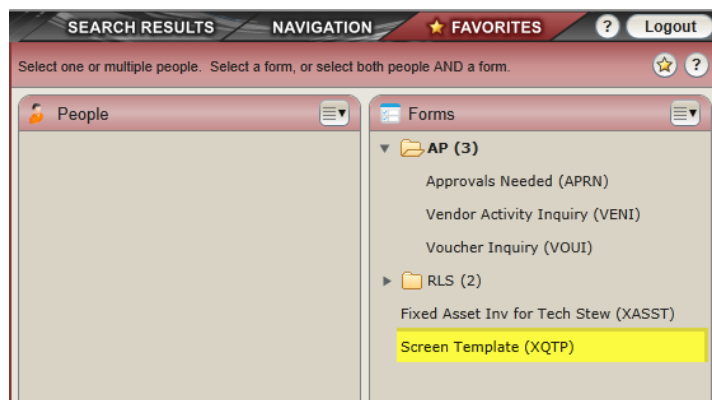
When you see the form you want to access, highlight it and click **Open** to open it. You can also double-click on the form name to open it.

In the top right corner of the **Navigation** panel, two buttons control how menus are expanded. Click the **Single Expand** button to expand only the selected menu and collapse any other menus that are currently expanded. Click the **Multi Expand** button to keep currently expanded menus open when you expand a new one. With this option, expanded menus will remain expanded until you explicitly collapse them.

Favorites Panel

Use the **Favorites** panel to retrieve and manage saved forms. To access the **Favorites** panel, click the **Favorites** tab.

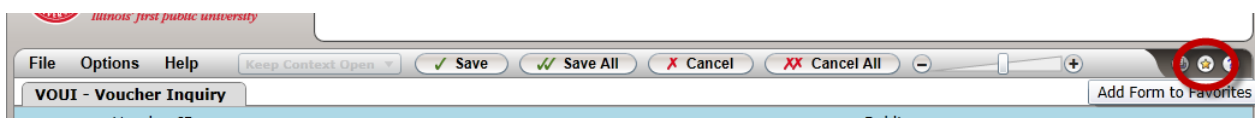
Figure 7: Favorites Panel



Adding a Form to Favorites

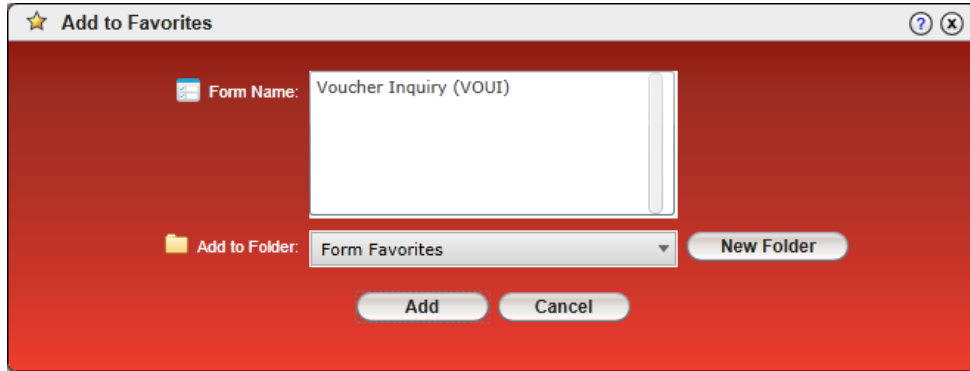
To add the current form to your Favorites, click the **Add to Favorites** (gold star) button in the upper right corner of the UI Form area.

Figure 8: Add to Favorites gold star



When you click the **Add to Favorites** button, the **Add to Favorites** dialog box appears. You can select an existing folder or create a new one to store the selected Favorites.

Figure 9: Add to Favorites dialog box



You can also select Add to Favorites by clicking on **File > Add Active Form to Favorites**, which will bring up the **Add to Favorites** dialog box.

Figure 10: Add Active Form to Favorites

