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

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

**Figure 5:** Search for specific mnemonic

![Voucher Inquiry](image)

**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

![Navigation Panel](image)
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*

![Favorites Panel](image1)

**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

![Add to Favorites dialog box](image)

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

![Add Active Form to Favorites](image)