QUICK KEYS

# Using Lookup Windows

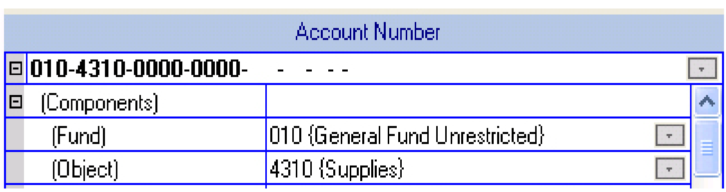
Lookup windows control the entry of codes in fields. Fields with lookups are marked with a button.


- **Open Lookup** – Click the button or press **F4**.
- **Filter Lookup** – In the field, type a few characters and press **F4**. In the lookup, type for dynamic filtering.
- **Select Multiple** – Hold down Shift for contiguous. Hold down Ctrl and click on non-contiguous entries.
- **Bypass Lookup** – Type until code becomes unique. Press **Enter**.

Some lookups require a few characters to be entered before displaying the lookup (i.e., vendors, employees).

# Entering Account Numbers

## Using Lookup Windows




The account lookup is filtered by the components entered and your permissions.

On search pages, you can enter a range (4501..4505), mask (45), wildcards (4**1), non-contiguous numbers (45,58) or “blank” (-).

## Using Key Data Entry

- A single period (.) jumps to the next component.
- A zero and a period (0.) enters a component of zeros.
- A double period (..) with no subsequent entry fills the rest of the account with blank components.

For example, using account structure: xxx-xxxx-xxxx-xxx

| | | |
|---|---|---|
| Typing: | 0100.9110.. | 010.47100. |
| Returns: | 010-0000-9110- | 010- -4710-000 |

# Work Space Navigation

| General Navigation | | |
|---|---|---|
| Home | **Ctrl+H** | Jumps to the Home page. |
| Activity Tree | **Ctrl+J** | Jumps to (shows) the activity tree, where you can use your arrow keys to navigate through the tree. |
| Show/ Hide Tree | **Alt+F6** | Toggles the activity tree (hide/show). |
| Activity List | **Alt+Enter** | Opens the drop-down list of open activities. |
| Next activity | **Alt+ Right arrow** | Switches to the next activity in the work space. |
| Previous activity | **Alt+ Left arrow** | Switches to the previous activity in the work space. |
| Close activity | **Ctrl+F4** | Closes the activity in the work space. Prompts if you have unsaved changes. |
| Tabs | **Ctrl+n** | Where n is the number of the tab in the work space.<br><br>For example, in most activities, Ctrl+1 would be the Search, Ctrl+2 the list, Ctrl+3 the form, Ctrl+4 a record you quick-linked to, etc. |
| How-to | **F1 or Ctrl+F1** | Displays the How-to for the activity you have in the work space. |
| Tutorial | **Ctrl+T** | Displays the Tutorial (if available) for the activity you have in the work space. |
| Exit | **Alt+F4** | Logs off and exits.<br>Prompts if any unsaved changes. |
| Logoff | **Ctrl+Shift+L** | Available only from the Home Page. Takes you to the login page. |
| Change password | **Ctrl+Shift+P** | Available only from the Home Page. Opens dialog box. |

| | | |
|---|---|---|
| **Search** | | |
| Go | **Ctrl+G** | Starts the search process. Some searches require at least some input. |
| Clear | **Ctrl+L** | Clears all fields (except defaults) on the search form. |
| Favorites | | Enters saved search criteria. May also automatically start the search. |
| **List** | | |
| New | **Ctrl+N** | Opens a form, ready for input. A menu may be displayed. (Either key creates a new record.) |
| Open | **Ctrl+O** | Opens highlighted record on the list. Not active if record is open. |
| Copy | **Ctrl+Y** | Copies highlighted record on the list, defaults many of the fields. |
| Export | **Ctrl+E** | Launches Microsoft Excel with information from the list. Not active if record is open. (If the activity has detail level exports, you can only use the button. The shortcut is inactive.) |
| Stop search | | Stops the system from getting any more records. |
| Primary sort | **Click** | Sets the primary sort when you click on a column heading. |
| Secondary sort | **Ctrl+click** | Sets the secondary (etc.) sort(s) when you click on additional column headings. |
| Remove secondary sort | **Shift+click** | Removes secondary (etc.) sort(s) when you click on sort column headings. |
| Reverse sort | **Ctrl+click** | Toggles ascending/descending sort when you click on a sort column heading. |
| Move column | **Press and hold** | Press and hold mouse and drag column to new location. |

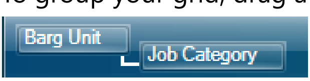
| | | |
|---|---|---|
| Find | **Type**<br><br>**Ctrl+F** | Works on primary sort only.<br>Start typing to find an entry on a list.<br>If filtering is turned on, pres **Ctrl+F** to display entire list. |
| Filter | **Alt+F3** | Toggles filtering on/off.<br>Press **Alt+F3** to start filtering mode.<br>Start typing to filter list on those characters. (For example, filter a list of employees to show only those with a last name of "smith.") |
| Return to original | **Ctrl+Shift+O** | Returns the list to the default sort. |
| **Form** | | |
| Next field | **Enter** | Validates entry and moves you to the next field. |
| Lookup, notepad, calendar | **F4** | Indicates that a lookup window, notepad or calendar is available for the field, whichever is appropriate. |
| Read only | | Indicates field or section is "locked" and cannot be edited. |
| Required entry or error | | Indicates a required field or an error. Double-click on this icon for more info. |
| Invalid | | Indicates that the entry is not valid. |
| Web address | | Quick link. Opens your web browser to that web site. |
| Address | | Quick link. Opens Google Maps for that address. |
| Email address | | Quick link. Launches your email with the address in the TO field. |
| Next record | **F8** | Saves and closes the current record, and opens the next record on the list. |
| Previous record | **F7** | Saves and closes the current record, and opens the previous record on the list. |

| | | | |
|---|---|---|---|
| Print preview |  | | Displays a snapshot for that record in the Document Viewer. May display menu. Also available from some lists. |
| Save/ Close |  | **Ctrl+S** | If no changes, closes the form and returns you to the list.<br>If changes, saves the record, closes the form and returns you to the list. |
| Save/ New |  | **Ctrl+Shift+N** | If no changes, closes the form and opens a new record.<br>If changes, saves the record and opens a new record. |
| Cancel |  | **Ctrl+L** | Cancels all changes and closes the form. Active only if you have made changes. |
| View SSN | | **Ctrl+I** | Shows the SSN, if the user has permission to view. |
| Delete<br>Undelete | <br> | | Deletes the current record. Detail records can be undeleted if the master has not been saved. Access by user permissions. |
| Task |  | | Displays a menu of tasks for a form or list. Access by user permissions. |

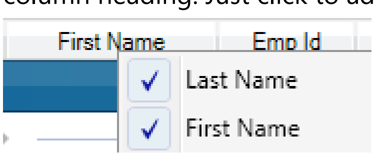
## Grids

All lists have a “grid” feature, converting your list to a Microsoft-Outlook style data grouping workspace.

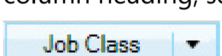
- To group your grid, drag a column heading into the header row.

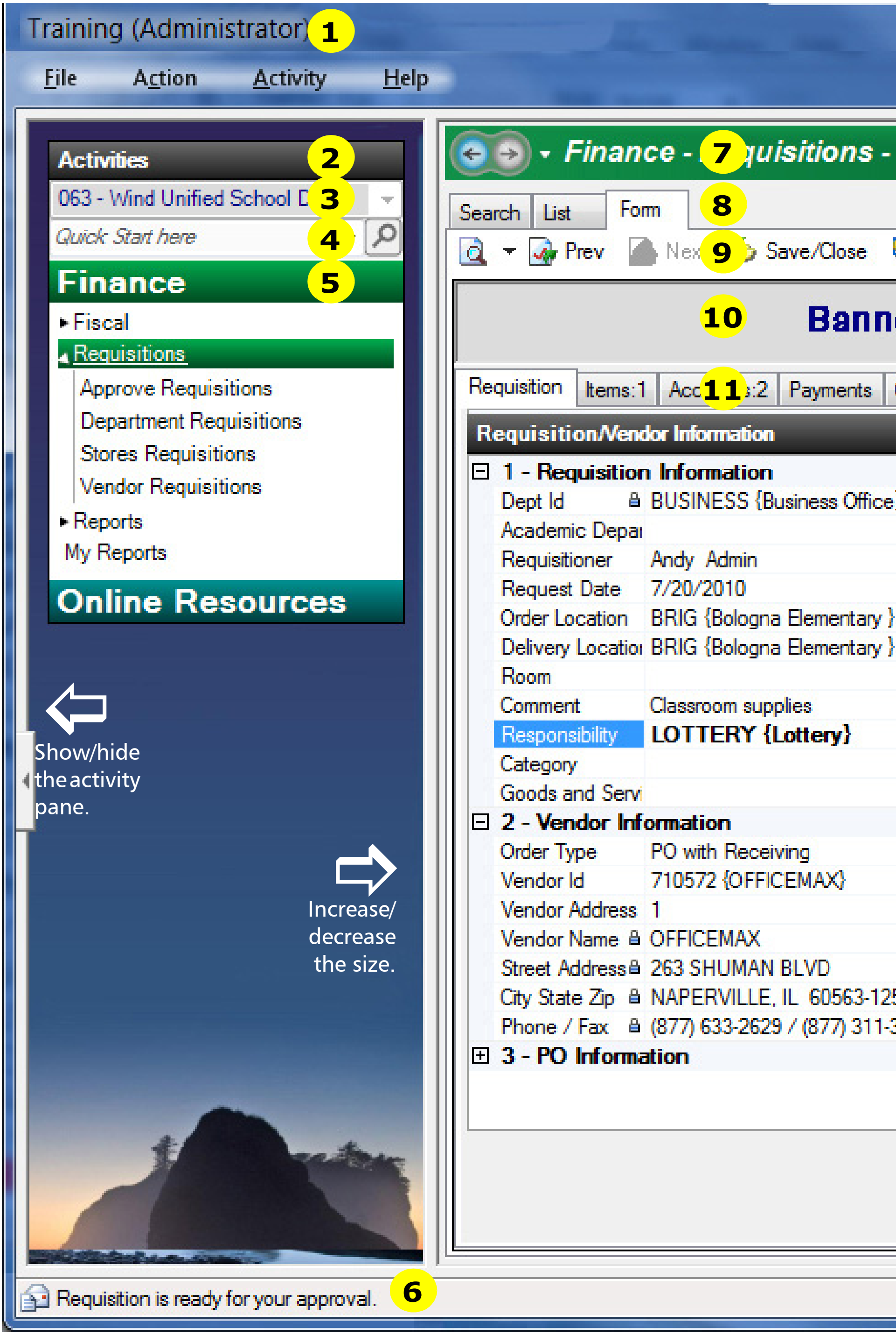


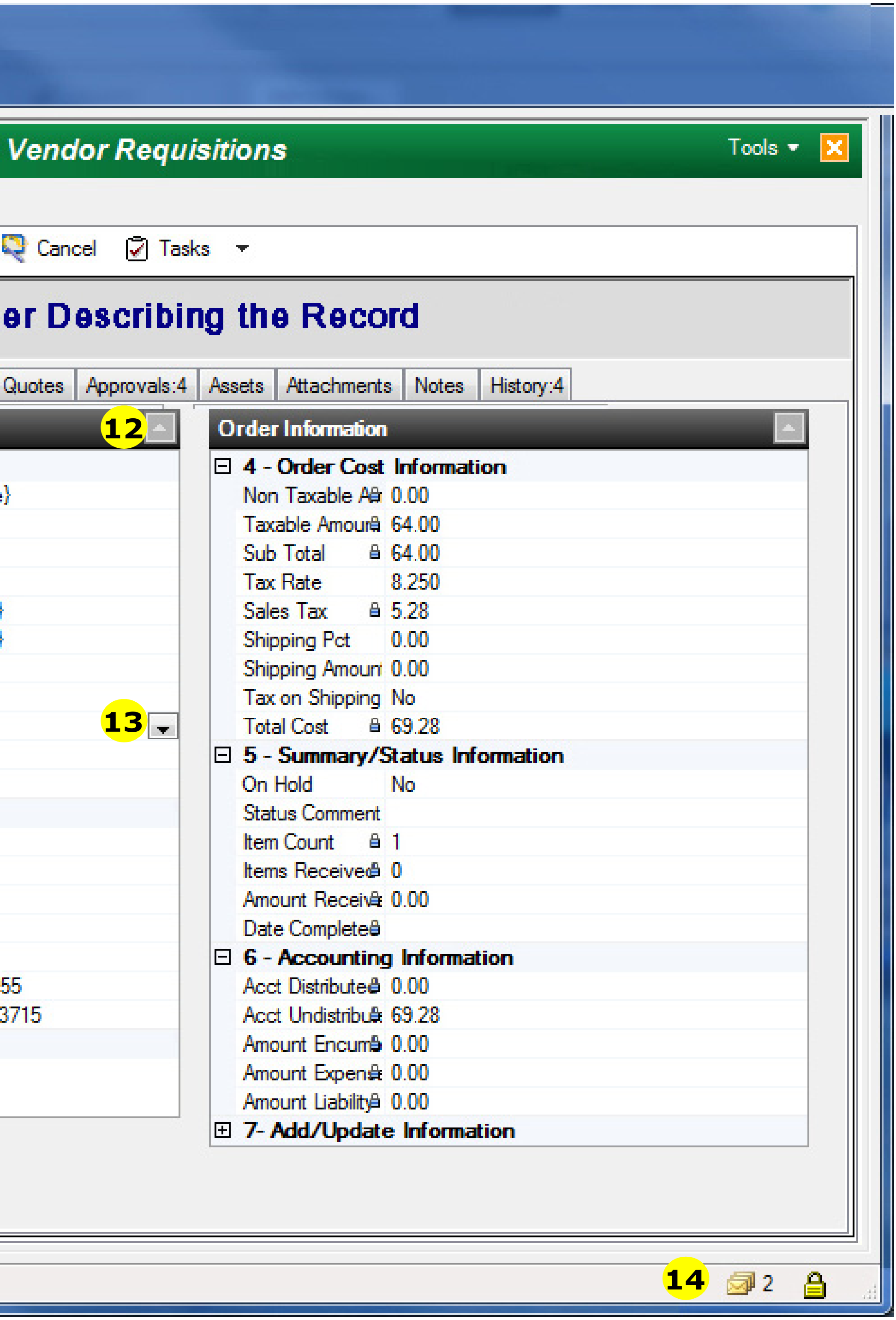

- To add/delete columns from the grid, right-mouse click on a column heading. Just click to add/drop a column from the grid.




- To get a list of values for a column, click the down arrow on a column heading, selecting/deselecting values.




Training (Administrator)
1
File
Action
Activity
Help
Activities
2
063 - Wind Unified School D
3
Quick Start here
4
Finance
5
Fiscal
Requisitions
Approve Requisitions
Department Requisitions
Stores Requisitions
Vendor Requisitions
Reports
My Reports
Online Resources
Show/hide the activity pane.
Increase/ decrease the size.
Requisition is ready for your approval.
6
Finance - Requisitions -
7
Search
List
Form
8
Prev
Save/Close
9
10
Requisition
Items:1
Payments
11
Requisition/Vendor Information
1 - Requisition Information
Dept Id
BUSINESS {Business Office
Requisitioner
Andy Admin
Request Date
7/20/2010
Order Location
BRIG {Bologna Elementary }
BRIG {Bologna Elementary }
Room
Comment
Classroom supplies
Responsibility
LOTTERY {Lottery}
Category
2 - Vendor Information
Order Type
PO with Receiving
Vendor Id
710572 {OFFICEMAX}
Vendor Address
1
Vendor Name
OFFICEMAX
263 SHUMAN BLVD
City State Zip
Phone / Fax
3 - PO Information


Vendor Requisitions
Tools
Cancel
Tasks
er Describing the Record
Quotes
Approvals:4
Assets
Attachments
Notes
History:4
12
Order Information
4 - Order Cost Information
Non Taxable A 0.00
Taxable Amour 64.00
Sub Total 64.00
Tax Rate 8.250
Sales Tax 5.28
Shipping Pct 0.00
Shipping Amoun 0.00
Tax on Shipping No
Total Cost 69.28
13
5 - Summary/Status Information
On Hold No
Status Comment
Item Count 1
Items Receive 0
Amount Recei 0.00
Date Complete
6 - Accounting Information
55
3715
Acct Distribute 0.00
Acct Undistribu 69.28
Amount Encum 0.00
Amount Expen 0.00
Amount Liability 0.00
7- Add/Update Information
14
2

**1** **Title Bar** – This displays the user and connection for this session.

**2** **Activity Pane** – This is always on the left side. The activity pane displays the organization drop-down, Quick Start field, and the activity tree.

**3** **Organizations** – Drop-down list if you have access to more than one organization.

**4** **Quick Starts** – The search field in between the organization list and the activity list is called Quick Starts. Quick starts allow you to launch an activity, fill in search parameters and start the search. Each activity has a quick start equivalent that is the first two or three characters of the activity name. For example, vendor requisitions have a quick start of VR, budget transfers have a quick start of BT, employees is EM, and so on. You can see all of the quick start equivalents by clicking the down arrow in the quick start field or pressing F1.

**5** **Activity Tree** – This lists the activities (grouped by module) that you can access according your permissions. For example, you may not see a certain activity if you do not have permissions for that activity.

- On the left is a toggle for showing/hiding the Activity Pane so you can see more of your workspace.
- On the right is a bar that defines the width of the Activity Pane. You can drag this to the right or left to increase/decrease the size.

**6** **Status Bar** – The status bar displays the progress of an activity or process. It lets you know your list is being built, or that a form is being opened. It will display the total number of records for your list, or a message if no records are found. It also gives you additional information, when running reports or processes. It also displays notifications from the message center and whether or not a record is locked because it is open by another user.

**7** **Workspace and Activity Title Bar** – The workspace is on your right. This takes up most of the screen and is tied to activities. There is no limit to the number of activities you can have open in the workspace.

- Across the top is the title of the activity, color-coded by module: green-Finance, blue-HR, and maroon-Payroll.
- If the activity is open as an all-org user, the title displays "All Orgs."
- If the activity is open as a single org, the title displays the org's name.
- The title bar also includes previous/next buttons that let you rotate through your open activities.
- To the right of the previous/next buttons is a drop-down list of your activities. Use Alt+Enter to display the list. Each activity on

the list displays a thumbnail of the record (you can see the actual record). Your current activity is marked with a bullet.

- On the far right side is the Tools drop-down menu. This contains tools for the current activity, like How-Tos and video tutorials.

**8** **Activity Tabs** – Each activity is opened in the workspace with its own tabs. Tabs are defined by the activity chosen. They allow the user to keep all elements of an activity open. For example, if you are performing a search, the tabs include Search, List and Form. This allows you to jump between your search criteria, the generated list and an open form.

**9** **Activity Toolbar** – Each activity has its own set of toolbars. For example, if you are on the Vendor Requisition form tab, the toolbar may contain Next, Previous, Close, Cancel, Print Preview and Tasks.

**10** **Form Banner** – The form banner displays basic information about the form currently opened. For example, a vendor requisition would display the requisition number, fiscal year and status. Note that special characters (i.e., an ampersand) may display as an underline.

**11** **Form Tabs** – Most records contain tabs. For example, a vendor requisition contains Requisition, Accounts, Items, etc. The record count for a tab is displayed after the colon. The count is updated when the main record is saved.

**12** **Form Section and Form Category** – Each form can have two sections and within those sections, several categories. In the example, the sections are displayed with a black background. Within the sections, there are categories displayed in dark gray. Both sections and categories can be collapsed or expanded. (Notice in the graphic that the PO Information and several other categories are collapsed.)

**13** **Fields** – Entering information into fields is as simple as typing or choosing a code from a lookup window.

- The field you are on is highlighted.
- If the field has a lookup, there will be a button at the end of the field. Use F4 or click on the button to get a list of entries.
- Press Enter to move to the next field.
- If you changed the field, the text is bold.
- If a red X is displayed, the field is required or there is an error. (Double-click the icon to learn more about the error.)
- Read-only fields are designated with a lock. (If the whole section is read-only, the lock will be displayed in the Form Section header.)

**14** **Notifications** – If you have new messages in the Message Center, this icon will include the number of unread messages. The latest message subject will display in the Status Bar.

# Entering Dates

There are multiple methods for entering dates.

## Entering a Single Date

This method is supported in searches, forms and reports.

| Sample Input | Result | Explanation |
|---|---|---|
| 01021958 | 01/02/1958 | Slashes are added. |
| 070166 | 07/01/1966 | Slashes are added. Year converted. |
| 62800 | 06/28/2000 | First number is assumed to be month. |
| 0406 | 04/06/xxxx | Slashes are added. Year assumed. |
| 301 | 03/01/xxxx | First number is assumed to be month. |
| 26 | xx/26/xxxx | First 1-2 numbers are assumed to be day. Current month, year assumed. |

## Using Mnemonics

This method is supported in searches, forms and reports. To use a mnemonic, enter the three/four character code below.

- BCM – Begin of Current Month
- ECM – End of Current Month
- BFY – Begin of Fiscal Year
- EFY – End of Fiscal Year
- BCC – Begin of Current Calendar Year
- ECC – End of Current Calendar Year
- BLC – Begin of Last Calendar Year
- ELC – End of Last Calendar Year
- BLM – Begin of Last Month
- ELM – End of last month
- BCQ – Begin of Current Quarter
- ECQ – End of Current Quarter
- ELQ – End of Last Quarter
- TDY – Today
- YDY - Yesterday
- CMO, CTU, CWE, CTH, CFR, CSA, CSU – Current Week Monday, etc.
- LMO, LTU, LWE, LTH, LFR, LSA, LSU – Last week Monday, etc.

- CFY – Current Fiscal Year Range
- NFY – Next Fiscal Year Range
- LFY – Last Fiscal Year Range
- CFT – Begin of Current Fiscal Year until Today Range

You can use single-date mnemonics to enter ranges and in a series. You also can perform simple math on single-date mnemonics. The syntax is +/- and the number of days, no spaces.

For example, if today is February 14, 2020:

- BCM – Returns 2/1/2020
- CFY – Returns 7/1/2019..6/30/2020
- TDY-2 – Returns 2/12/2020
- CMO..EFY – Returns 2/10/2020..6/30/2020
- BCQ..ECQ – Returns 1/1/2020..3/31/2020
- BCM+1..ECM+2 – Returns 2/2/2020..3/2/2020
- TDY.. – Returns on or after today
- ..TDY – Returns on or before today

## Searching for Date Ranges

This method is supported in searches only. Ranges are entered using two consecutive dots (..). Multiple values (series) are separated by commas. You may mix and match on search pages.

- When no years are entered, the "thru" year defaults to the current year.
- When "from" is the current/previous year, the "thru" year defaults to the current year.
- When "from" is a "future" year, the "thru" year defaults accordingly.
- When "thru" is the current/previous year, the "from" year defaults accordingly.
- When "thru" is a "future" year, the "from" year defaults to the current year.

For example, if today is February 14, 2020:

- 10/1..2/1 – Returns 10/1/2019..2/1/2020 (no years)
- 10/1/19..2/1 – Returns 10/1/2015..2/1/2020 (from year previous)
- 10/1/21..2/1 – Returns 10/1/2021..2/1/2022 (from year future)
- 10/1..2/1/19 – Returns 10/1/2018..02/01/2019 (thru year previous)
- 10/1..2/1/21 – Returns 10/1/2020..02/01/2021 (thru year future)
- 1..TDY,2/25 – Returns 2/1/2020..2/14/2020,2/25/2020 (series)

## Searching for Ranges/Series in Non-Date Fields

You can search other fields using ranges and series, too. For example:

- smi – Returns all last names that start with “smi” including Smith and Smithberg.
- smi.. – Returns all last names that start with “smi” until the end of the file. Basically, this is the same as you entering “smi..z”.
- buckley,buss – Returns all last names that start with “buckley” or “buss”.
- WO-00075..WO-00080,WO-54823 – Returns all work orders between WO-00075 and WO-00080, and work order WO-54823.
- % – Returns a list that includes records with ANY data in that field.
- %Smith – Returns all employees with “smith” anywhere in the last name (like Lord Smith).
- 0.5625..0.625 – Returns all with an FTE between 0.5625 and 0.625.
- 0.5625,0.625 – Returns all records with an FTE of 0.5625 or 0.625.

## Navigating the Document Viewer

Whether you view a report immediately after running it or view it later using My Reports, the report is displayed via the Document Viewer.

| | | |
|---|---|---|
| Fit Page | **Ctrl+0** | Zooms to display entire page. |
| Actual Size | **Ctrl+1** | Zooms to the actual size of text. |
| Fit Width | **Ctrl+2** | Zooms to the width of the page. |
| Zoom in | **Ctrl++** | Zooms in on the cursor. |
| Zoom out | **Ctrl+-** | Zooms out from the cursor. |
| Find | **Ctrl+F** | Opens the find dialog. |
| Go to Page | **Ctrl+G** | Places cursor in page field. |
| Show/Hide Bookmarks | **F12** | Toggles showing/hiding bookmarks (for drill-down). |