Guide to User Interfaces

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3. User Interface 1.0

About User Interface 1.0

In This Chapter

This chapter helps you learn how to use User Interface 1.0 with Benefactor or Colleague. It includes instructions for accomplishing various tasks, such as accessing a form, saving your work, and using online Help. It also provides guidance on using current documentation.

User Interface 1.0 is the third generation of the enhanced GUI. Features of User Interface 1.0 include:

- Tabbed multiple forms managed within the application workspace
- “Save All” and “Cancel All” functions
- A Windows Explorer-style tree structure for process menus
- A “Favorites” feature enabling quick access to commonly used processes
- An address bar for launching specific processes
- A Detail button next to every field that allows detail
- A drop-down box next to every field that has validation codes
- A calendar button next to every date field
- A calculator button next to every numeric field
- Support for proportional fonts
- A GUI report browser and navigation buttons
- Ability to store options for multiple users on a single client
- Compatibility with Envision 4.6.1 and above
- Compatibility with all supported operating systems

Logging In

When you install User Interface 1.0 on your PC, icons are created on your desktop and in the Datatel group under Programs in your Windows Start menu.

Procedure for Logging In

ALERT! If you also use FrontView, be sure to close it before starting User Interface 1.0. Running User Interface 1.0 and FrontView simultaneously will cause a script error.

Complete the following steps to log into a Datatel product:

Step 1. To display the Login dialog box, perform one of the following procedures:

- Double-click the desktop icon , or
- Select Datatel from the Datatel menu under Programs in the Windows Start menu.

The Login dialog box is displayed, as shown in Figure 3-1.

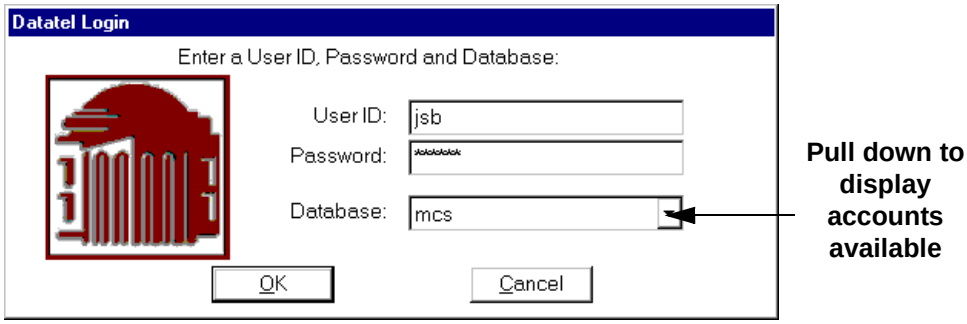


Figure 3-1: User Interface 1.0 Login Dialog Box

Step 2. Enter your user ID and password and click **OK**. A dialog box appears, informing you that User Interface 1.0 is loading the application files. When the files are loaded, the application workspace appears, as shown in Figure 3-2.

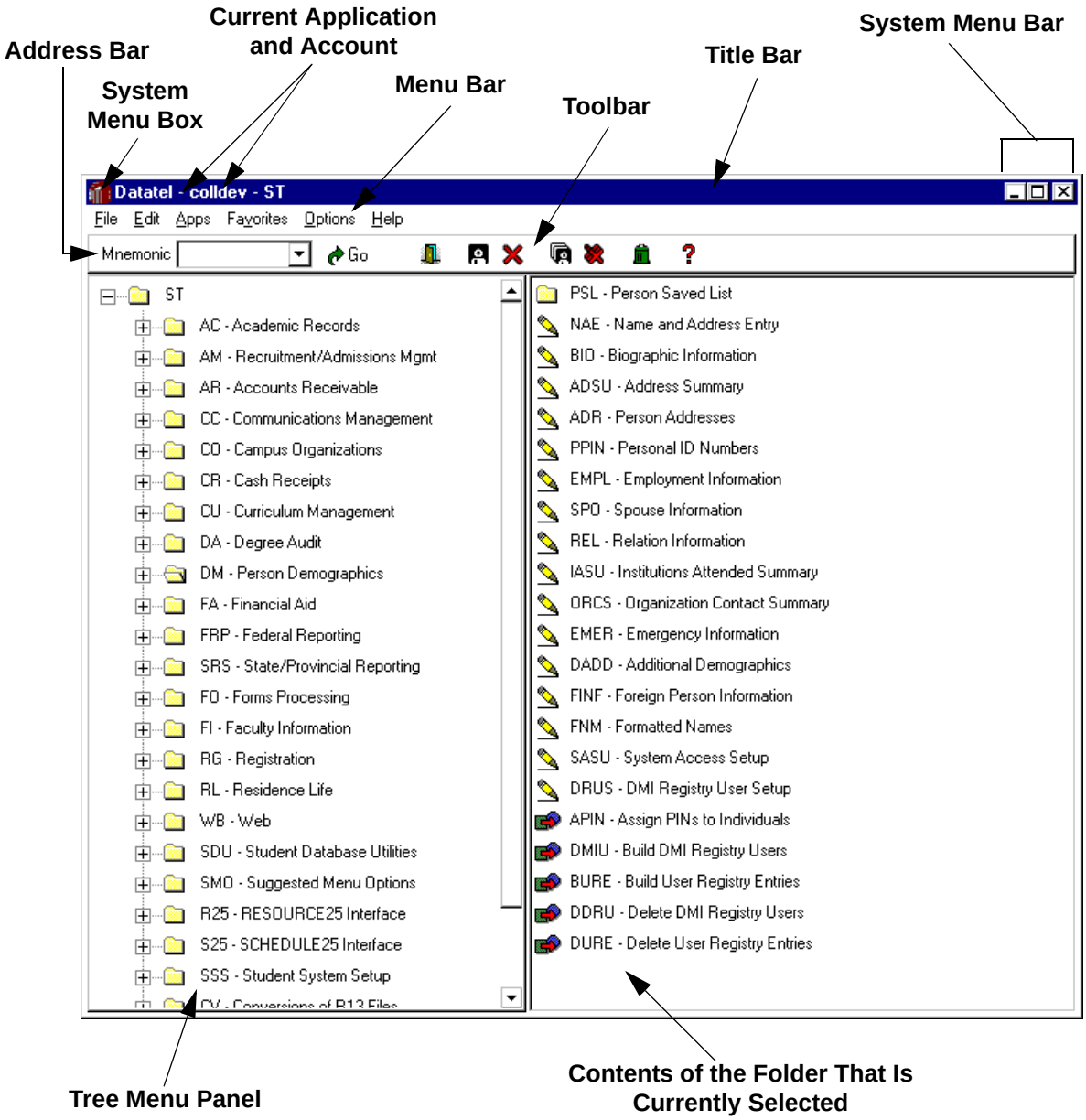


Figure 3-2: Application Workspace

Note: The Save All and Cancel All buttons and the corresponding File drop-down menu options enable you to save or cancel all of your changes simultaneously to every screen that is currently open.

Step 3. If necessary, select the application with which you wish to work from the Apps menu at the top of the application workspace. The left panel of the application workspace displays the folders and processes available for the selected application in expandable tree format.

Click the Plus sign ⊞ next to any folder icon in the left panel to expand the folder. When a folder is expanded, you can click the Minus sign ⊟ next to its icon to collapse it.

Double-click a folder icon in either panel to expand the folder. Double-click a form icon in either panel to open the form.

When a form is open, it is displayed in the right panel. When no form is open, the right panel displays the contents of the folder that is currently selected.

Note: Using Colleague 17.0 you can choose to have the left panel of the application workspace remain visible (default condition), or to hide it in order to allocate more space to the form.

The Application Workspace

The application workspace, shown in Figure 3-2 on page 3-3, is the container for all the processes you use while working with Benefactor or Colleague.

Title Bar

The title bar, shown in Figure 3-3, tells you which Colleague or Benefactor database you are accessing and which application you are currently running. The title bar is highlighted when the application workspace is the active window.

Figure 3-3: Title Bar

System Menu Box

Click the System menu box to access the System menu options: Restore, Move, Size, Minimize, Maximize, or Close. Depending on the current state of the application workspace, some options may be disabled. To close the application workspace when no forms are open, you can double-click the system menu box. If any forms are open, a message indicates that you cannot close the control box when you are in a form.

Menu Bar

The menu bar, shown in Figure 3-4, enables you to:

- Perform routine tasks, such as save your work or cut and paste items
- Choose an application with which to work; for example, the Financial System or the Human Resources System
- Choose a form in which to work
- Define your preferences for how forms are displayed
- Access online Help

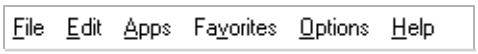


Figure 3-4: Menu Bar Detail

Toolbar

The toolbar, shown in Figure 3-5, provides easy access to common functions, such as saving your work, canceling changes, deleting records, and accessing online Help.

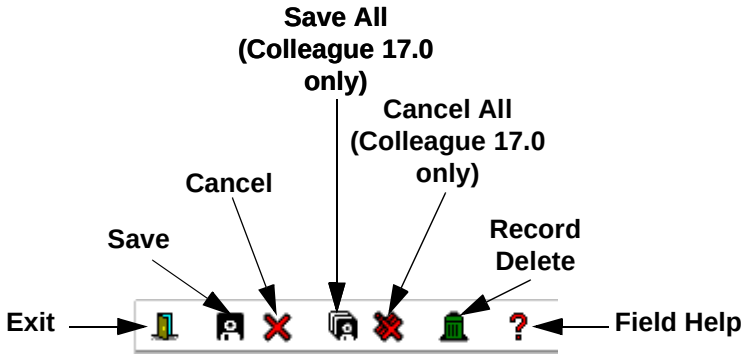


Figure 3-5: Toolbar Detail

Note: The Record Delete button is used to delete an entire record, and only works for forms which have been defined to allow this option. When you click this button, you are prompted to confirm that you wish to delete the entire record.

The Save All and Cancel All buttons and the corresponding File drop-down menu options, *available only with Colleague 17.0*, enable you to save or cancel all of your changes simultaneously to every screen that is currently open.

Address Bar

The address bar, shown in Figure 3-6, enables you to access any form directly by entering its mnemonic, or by using the drop-down menu button to select a previously used mnemonic. Press **Enter** or click the Go button Go to display the selected form.

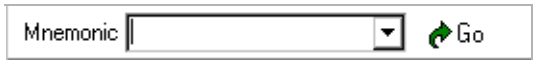


Figure 3-6: Address Bar Detail

System Menu Bar

The System menu bar, shown in Figure 3-7, enables you to minimize, maximize, or close the application workspace.

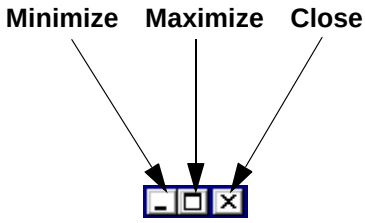


Figure 3-7: System Menu Bar Detail

When the application workspace is maximized, the Maximize button is replaced by the Restore button in the System Menu bar.

Note: You can also resize the application workspace by dragging its outer frame.

What is a Form?

Most of your work in Benefactor or Colleague is done through forms. In documentation for earlier interfaces, what we refer to here as a “form” is often called a “screen.” They are the same thing; we have chosen to use the term “form,” however, to keep our terminology consistent with standard Windows usage, while referring to the application workspace or a resolution list as a “screen.”

When you select a form in Colleague 17.0, it appears in the right panel of the application workspace, as shown in Figure 3-8, with its name and mnemonic displayed on a tab.

Note: The Save All and Cancel All buttons and the corresponding File drop-down menu options enable you to save or cancel all of your changes simultaneously to every screen that is currently open.

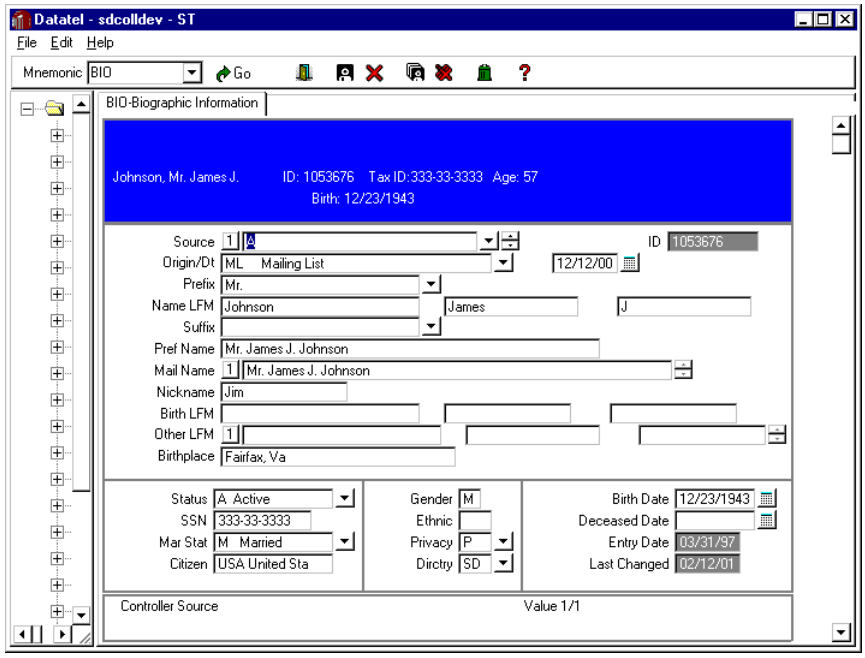


Figure 3-8: Sample Form in Application Workspace (Colleague 17.0)

Note: Depending on your font, resolution, and monitor size, scroll bars are available as needed to view forms that do not fit in the application workspace.

The details of the sample form are shown in Figure 3-9.

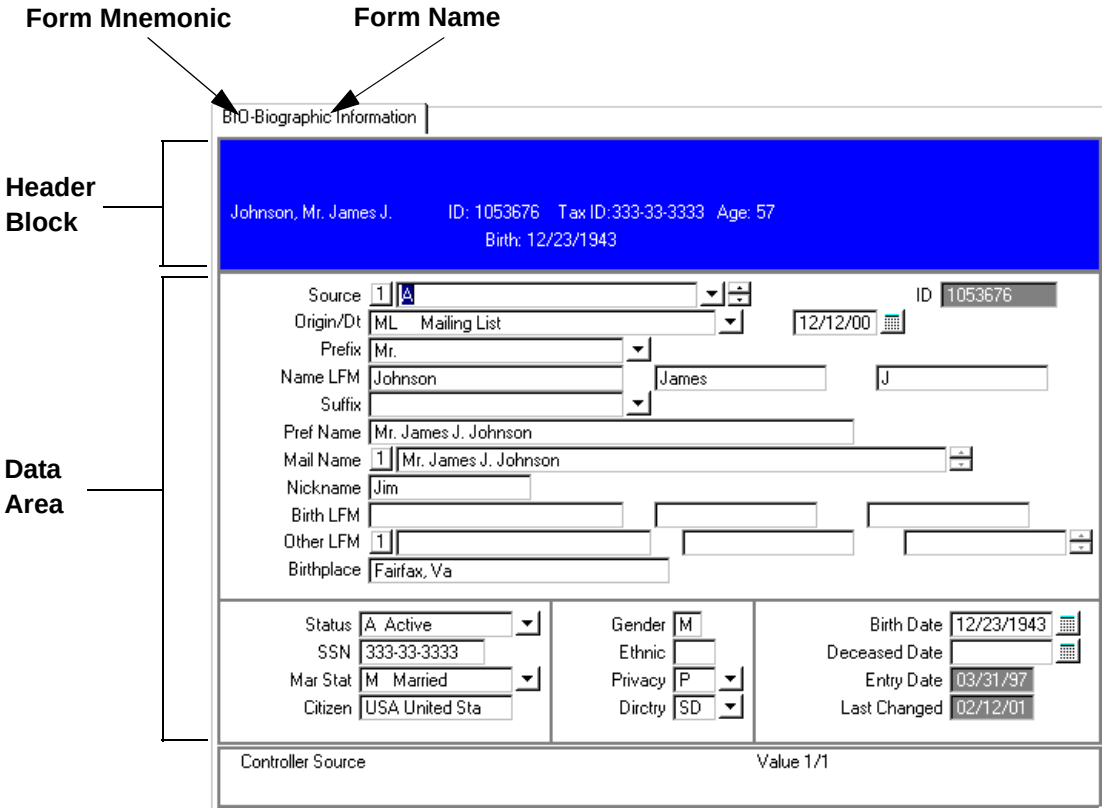


Figure 3-9: Sample Form Detail

Note: While a form is open in Colleague 17.0, you can allocate more viewing space to it by choosing Hide Tree Menu from the Edit menu. The left tree menu panel closes, and the form now occupies the entire application workspace. Choose Hide Tree Menu from the Edit menu again to toggle this option off and display the tree menu in the left panel.

Form Tab

The form tab displays the form mnemonic and the form name. When more than one form is open, the tab furthest to the right represents the active form.

Header Block

The header block displays data that identifies the item with which you are working. For example, the header block in Figure 3-9 on page 3-9 displays a student's name and ID.

Data Area

The contents of the data area differ depending on the form with which you are working. In general, the data area consists of various types of fields.

Fields

A field is any place on the form where data is displayed or where you enter data. In most cases, each field is accompanied by a field label indicating what kind of data belongs in the field.

What you are allowed to enter in a field may or may not be restricted by Benefactor or Colleague. For example, Benefactor and Colleague allow you to enter any combination of letters for a person's name. On the other hand, in the Type field on the CORE System's Address Maintenance (ADR) form, you can only enter one of the values from the list of valid address types, such as "Home," "Business," or "Local." Fields such as this, where your entries are restricted, are referred to as "validated fields."

Note: With fields that are code-driven, such as validated fields, you will notice that the code's description disappears when you are entering data in the field. This is intentional. The code's description returns as soon as you leave the field. See "Drop-Down Table Button" beginning on page 3-22 for information about selecting codes for validated fields.

Another unique kind of field is a detail field, which allows you to access another form from the form you are on. See "Detail Forms" beginning on page 3-15 for more on this topic.

Groups

A group is a set of related fields. Each field in a group can have multiple values. Furthermore, there are usually several fields in a group that are associated with each other in some way; these are often referred to as associated multivalues. Some sets of associated multivalues are presented as

rows and some are presented as columns; that is, some groups are row-oriented and some are column-oriented. In either case, the intersection of a column and a row is referred to as an element.

The Line Items group shown on the Relation Information (REL) form in Figure 3-10 is a row-oriented group. You read each set of fields across a row.

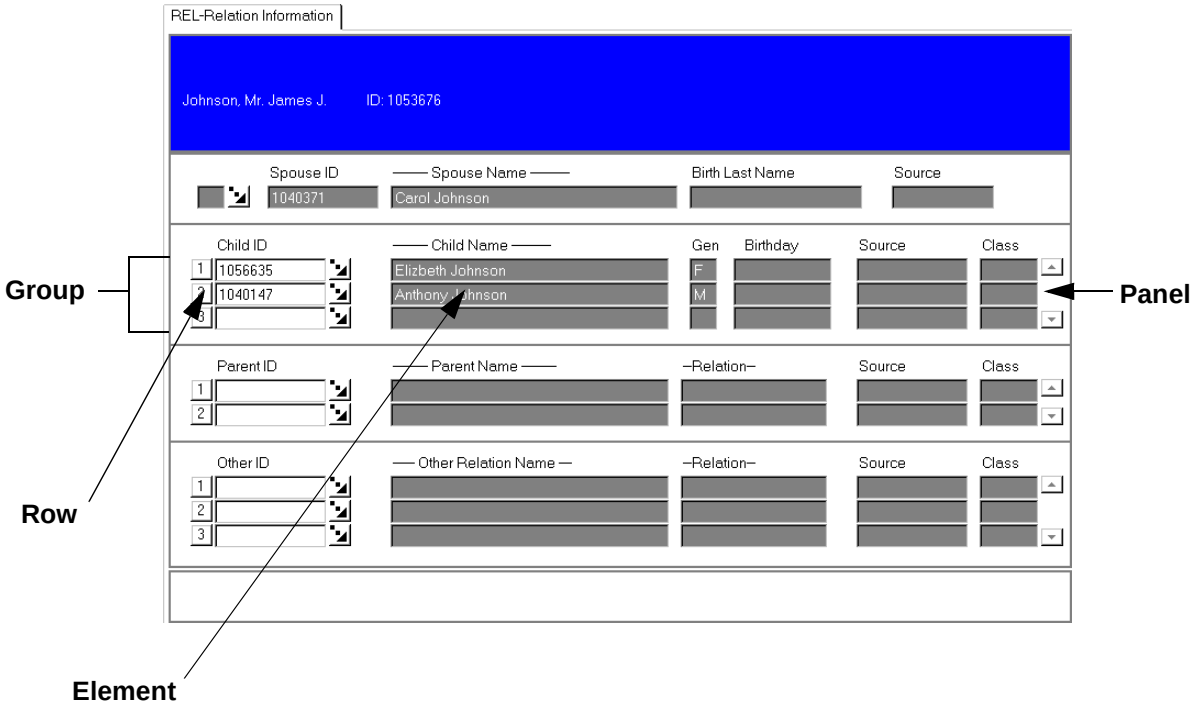


Figure 3-10: Example of a Row-Oriented Group

Field Text and Background Colors

You can choose Change Colors from the Options menu to set field text and background colors to fit your preferences (see “Colors” beginning on page 3-53). The Datatel defaults reflect field type, with a white background for editable fields and a gray background for non-editable fields, as follows:

- Normal (editable): black text on white background
- Inquiry (not editable): black text on gray background
- Detail (editable): black text on white background
- Inquiry/Detail (not editable): black text on gray background

Accessing a Form

From the Tree Menu

The graphical, tree-structured menus enable you to navigate through an application's menus and submenus by pointing and clicking, while maintaining a comprehensive view of the entire menu. When you select an application, the application workspace menu form is displayed, as shown in Figure 3-2 on page 3-3. The left tree menu is the main navigational menu. The right menu displays the submenus and forms contained in the folder selected in the left menu.

Menus and submenus are represented by folder icons, while forms are represented by four different icons according to functionality, as shown in Figure 3-11.

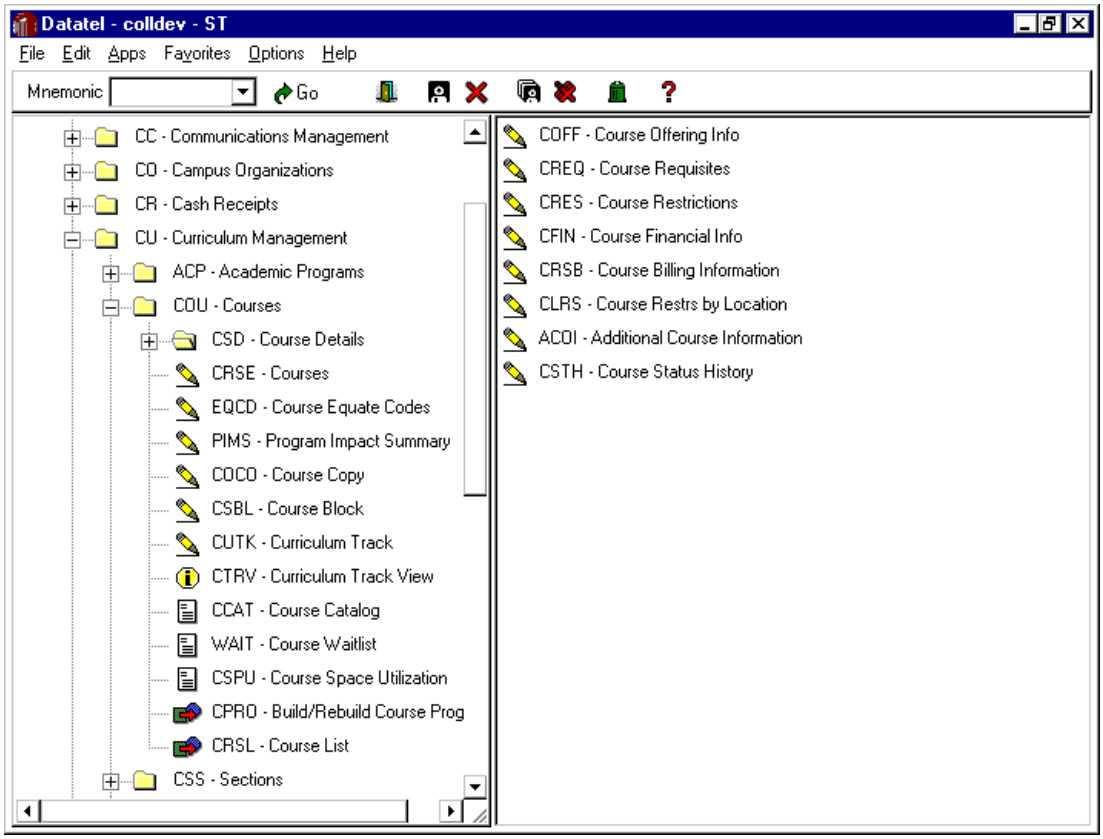


Figure 3-11: Expanded Tree Menu

- **Maintenance.** Maintenance forms, represented by the Maintenance icon , allow you to enter and change data that is permanently recorded in your database; for example, a person's name and address.

Note: If your system administrator has given you read-only access to a maintenance form, you will be able to access it in inquiry mode only, even though it displays the Maintenance icon in the tree menu.

- **Processing.** Processing forms, represented by the Processing icon , allow you to start a program that manipulates a record or group of records behind the scenes; for example, posting a group of transactions to the general ledger.
- **Inquiry.** Inquiry forms, represented by the Inquiry icon , allow you to view information without changing it; for example, the history of a general ledger account. Strictly speaking, inquiry forms are forms that are *designed* to display information without allowing changes to that information. In contrast to an inquiry form designed as such, you may also access a maintenance form in inquiry mode if your system administrator has given you read-only access to it. Although the effect for you is the same, a maintenance form viewed in inquiry mode is, nevertheless, different from a form designed specifically as an inquiry form.
- **Reporting.** Reporting forms, represented by the Reporting icon , allow you to generate a particular report according to your specifications. For example, today you may wish to see a report on vouchers with a due date two weeks from now, and tomorrow you may decide you want to see the same report for vouchers with a due date four weeks from now.

Note: See "Browsing Reports" beginning on page 3-45 for information about the Report Browser.

Locating and Selecting Forms

You can locate and select forms in several ways:

- Use the tree menu to navigate through the folders. Once you have selected the appropriate top-level folder, you can expand it to locate the desired form. To select a folder or form in a tree menu, double-click it.
- Enter a form mnemonic in the address bar, shown in Figure 3-12, or use the drop-down list to select a previously used form mnemonic. Press **`Enter`** or click the Go button Go to display the form.

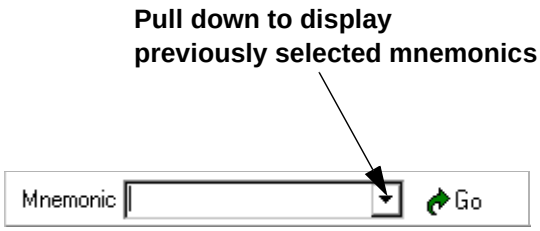


Figure 3-12: Address Bar

- Use the Favorites drop-down menu to select a form that has been previously added to your list of favorites, as shown in Figure 3-13. See "Favorites" beginning on page 3-56 for information about creating a list of favorites.

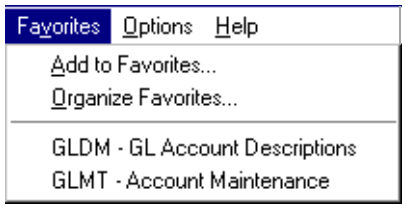


Figure 3-13: List of Favorites

- Click the File menu to display the mnemonics of the last ten forms you accessed, and select a form from the list.
- Choose Run from the File menu or press **`Alt-F-R`**. The Envision Run dialog box appears, as shown in Figure 3-14. Enter the mnemonic of the form you want, click **`OK`**, and Benefactor or Colleague will display it.

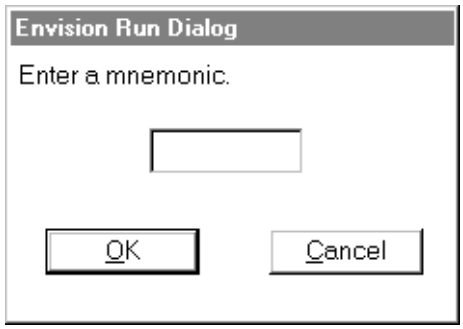


Figure 3-14: Envision Run Dialog Box

Detail Forms

Some forms only give you limited or summary information about a certain item, but provide you with the capability of moving to another form. This form, which is known as a detail form, provides more complete information on that item. For example, as shown in Figure 3-15, the Student Profile (SPRO) form contains the Academic Program field. The Academic Program field only provides a code to indicate the program. To the right of the field is a Detail button , which allows you to detail to the Student Academic Program (SACP) form for more information about the academic program.

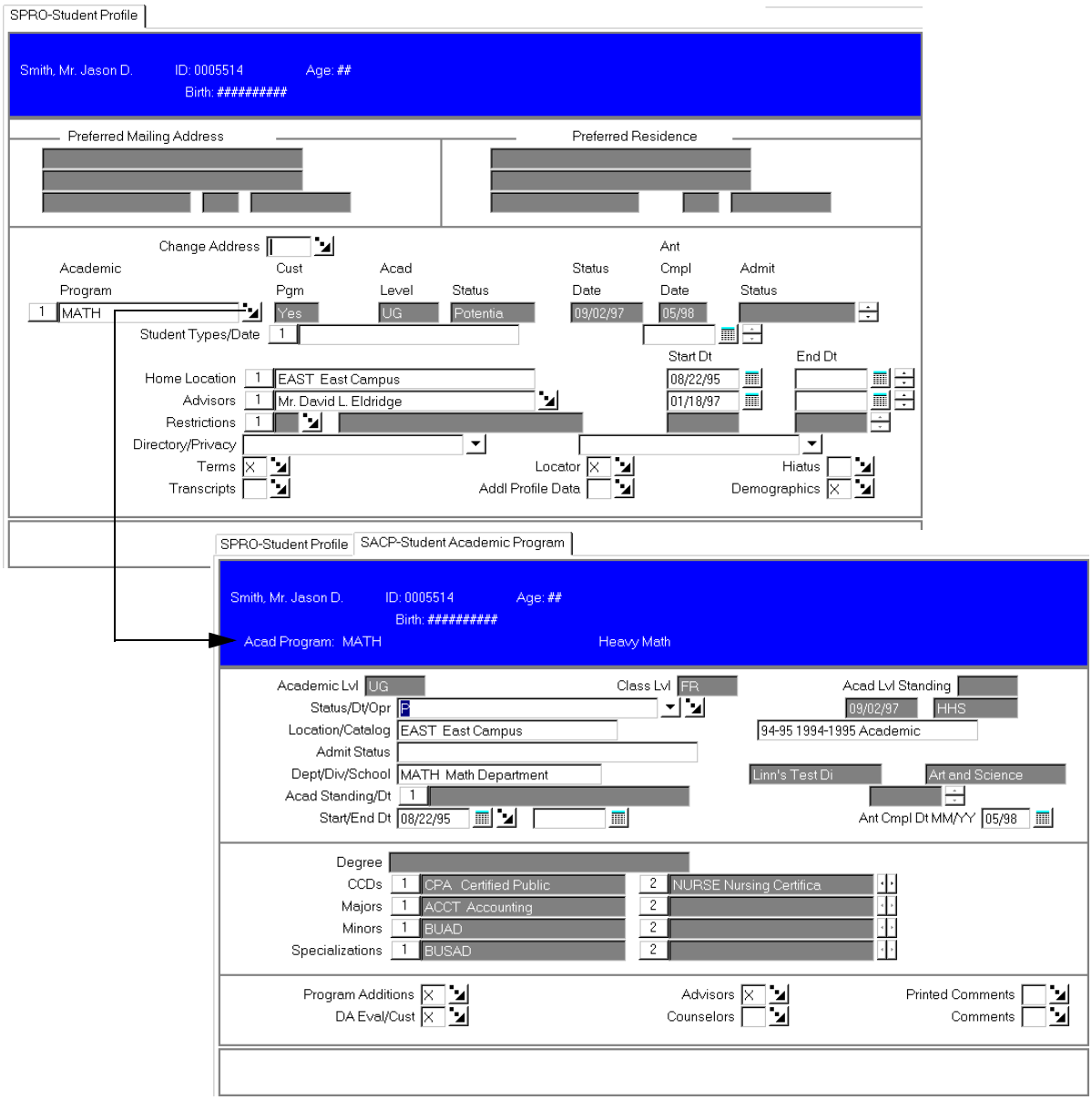


Figure 3-15: Student Profile (SPRO) Form Detailed to Student Academic Program (SACP) Form

When you click the Detail button to the right of the Academic Program field, the SACP form is displayed with its tab to the right of the SPRO form tab, as shown in Figure 3-15.

Note: The tab furthest to the right represents the active form. To ensure that each record is completed properly, only one form can be edited at a time. All forms below the current open form are inquiry only and do not allow input. Data on these forms is grayed out while another form is active.

Although the usual workflow is to access a detail form from another form, some detail forms are also available from the menu tree. Others, even though they are not listed on a menu, may still be accessed directly (see "Accessing a Form" beginning on page 3-12 for more on this topic). Detail forms that can be accessed only via another form are referred to as *detail-only* forms.

Note: If you try to access a detail-only form directly, a message is displayed telling you that you cannot do so.

So how do you know whether a detail form is available from the form you are working on and, if so, how do you access it? You will know a detail form is available for a field if there is a Detail button to the right of the field. Such fields are referred to as *detail fields*.

You can use one of the following two methods to access a detail form from a detail field:

- Click the Detail button to the right of the field.
- With the cursor in the detail field, choose Detail from the File menu.

Shortcuts

If you prefer to bypass the tree menus, you can use shortcuts to access forms that are otherwise available from a tree menu. You can also use these shortcuts to access detail forms, as long as they are not detail-only forms. See "Detail Forms" beginning on page 3-15 for more information about accessing detail forms.

Address Bar

To access a form from the address bar, enter its mnemonic in the text box, as shown in Figure 3-12 on page 3-14, and press Enter or click **Go**. The specified form is displayed.

File Menu Drop-Down List

You can display any one of the last ten forms you have accessed previously by selecting it from the File menu as shown in Figure 3-16.

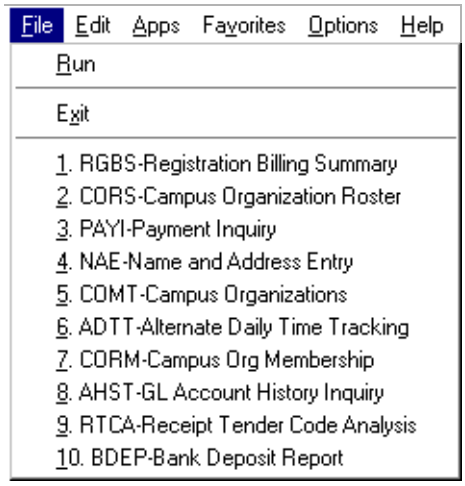


Figure 3-16: File Menu Showing Previously Selected Forms

Run Dialog Box

Complete the following steps to access a form directly, using the Run Dialog box:

Step 1. From the File menu, choose Run (or press **`Alt-F-R`**). The Run Dialog box is displayed, as shown in Figure 3-14 on page 3-14.

Step 2. Enter the desired mnemonic in the text box and click **`OK`**. The specified form is displayed.

Direct Access

If you have a form open, you can choose Direct Access from the File menu to save or cancel the current record and open a different form for the same key. For example, if you are working with a person in the Name and Address Entry (NAE) form and then use Direct Access to move to the Biographic Information (BIO) form, the NAE form is closed and the BIO form opens with the same person selected. When you finish from the second form, you are returned to the original form.

Favorites

You can also create and organize a list of favorite forms to be accessed from the Favorites drop-down menu, as shown in Figure 3-13 on page 3-14. See "Favorites" beginning on page 3-56 for information about setting up Favorites.

Additional Features of User Interface 1.0

User Interface 1.0 offers several additional features in the form of control buttons that assist you in viewing and editing data, as shown in Figure 3-17.

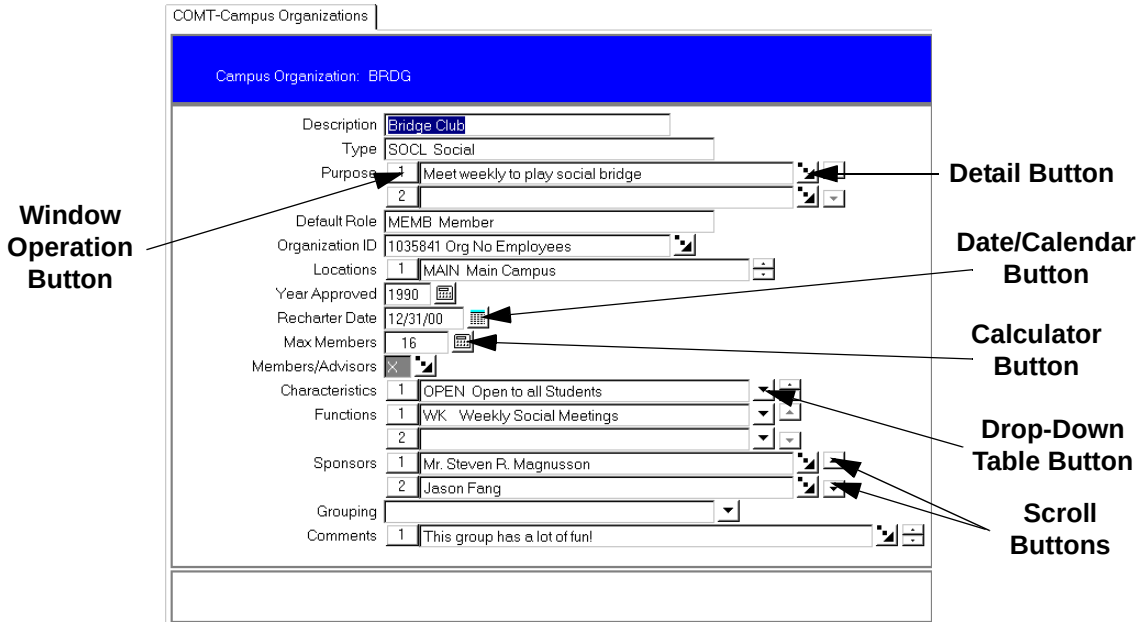


Figure 3-17: Additional Features

Detail Button

A Detail button appears to the right of each Detail field and allows you to access the associated detail form. For more information, see “Detail Forms” beginning on page 3-15.

Window Operation Button

A Window Operation button 1 enables you to insert or delete a row of data. When you click the Window Operation button, the Select Window Operation dialog box is displayed, as shown in Figure 3-18.

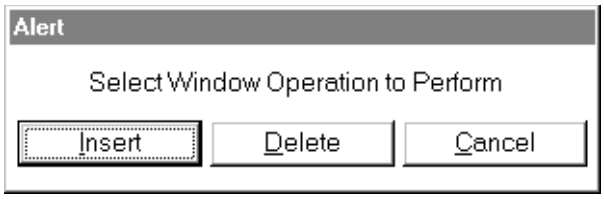


Figure 3-18: Select Window Operation Dialog Box

- Click **`Insert`** to insert a new row above the current row.
- Click **`Delete`** to delete the current row.
- Click **`Cancel`** to leave the row unchanged and return to editing.

Scroll Buttons

Scroll buttons enable you to view multiple values. There are two different types of scroll buttons:

Small buttons appear to the right of fields that display one value at a time.

Larger buttons appear to the right of fields that display two or more values at a time.

Date/Calendar Button

A Date/Calendar button appears to the right of each date field. Click the Date/Calendar button to display the calendar browser, as shown in Figure 3-19.

Figure 3-19: Calendar Browser

Click the single arrows to scroll the calendar backwards < or forwards > by month, or the double arrows to scroll backwards << or forwards >> by year. Click the desired date in the body of the calendar to select it.

Calculator Button

A Calculator button appears to the right of each numeric field. Click the Calculator button to display a calculator, as shown in Figure 3-20.

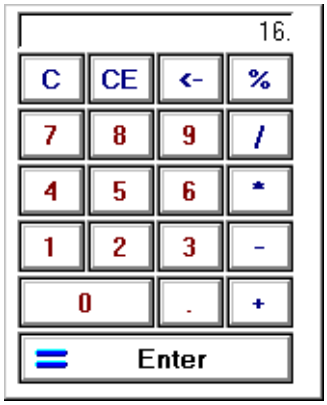


Figure 3-20: Calculator Feature

Drop-Down Table Button

A Drop-Down Table button appears to the right of each field that has a predetermined set of valid entries. Click the Drop-Down Table button to display a validation code table, as shown in Figure 3-21.

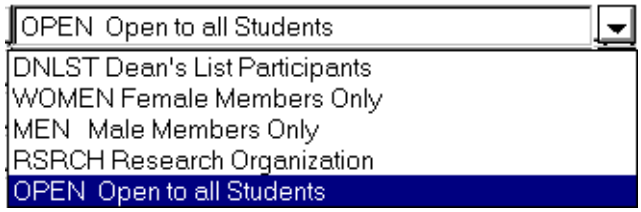


Figure 3-21: Validation Code Table

Click on the appropriate code to select it.

Note: The Windows 95 and 98 operating systems place constraints on the number of controls that can be displayed on a form. If necessary, User Interface 1.0 omits some control buttons from the display and prompts you to contact the Solution Center. This may occur with custom forms that contain a large number of controls.

Multiple User Profiles

User Interface 1.0 supports multiple user settings on one PC. If a PC is shared by more than one user, User Interface 1.0 maintains individual color settings, font sizes, and favorites menus for each user ID. See “Defining Your Preferences” beginning on page 3-52 for information on setting user preferences.

Finding a Record

Now that you know how to access a form, you need to know how to access the records you want to work with on that form. For example, if you want to change a person's address, you must tell Benefactor or Colleague which person you want to see.

You specify which record you wish to work with by responding to the LookUp prompt that is displayed after you access a form. LookUp prompts are displayed in a dialog box similar to that shown in Figure 3-22.

Figure 3-22: LookUp Prompt

Notice that the LookUp prompt is labeled, in this case, "Person LookUp." LookUps that pertain to people or organizations are referred to as person- and organization-related LookUps. Person LookUp, Student LookUp, Applicant LookUp, and Vendor LookUp are a few of the person- and organization-related LookUps you will find in Benefactor or Colleague.

Some fields within forms are validated against other files. LookUp is used in such fields to help you locate valid codes or items that you wish to associate with the main record on which you are working. When you are in a field that is validated against another file, you will see a LookUp indicator in the lower left corner of the form, as shown in Figure 3-23.

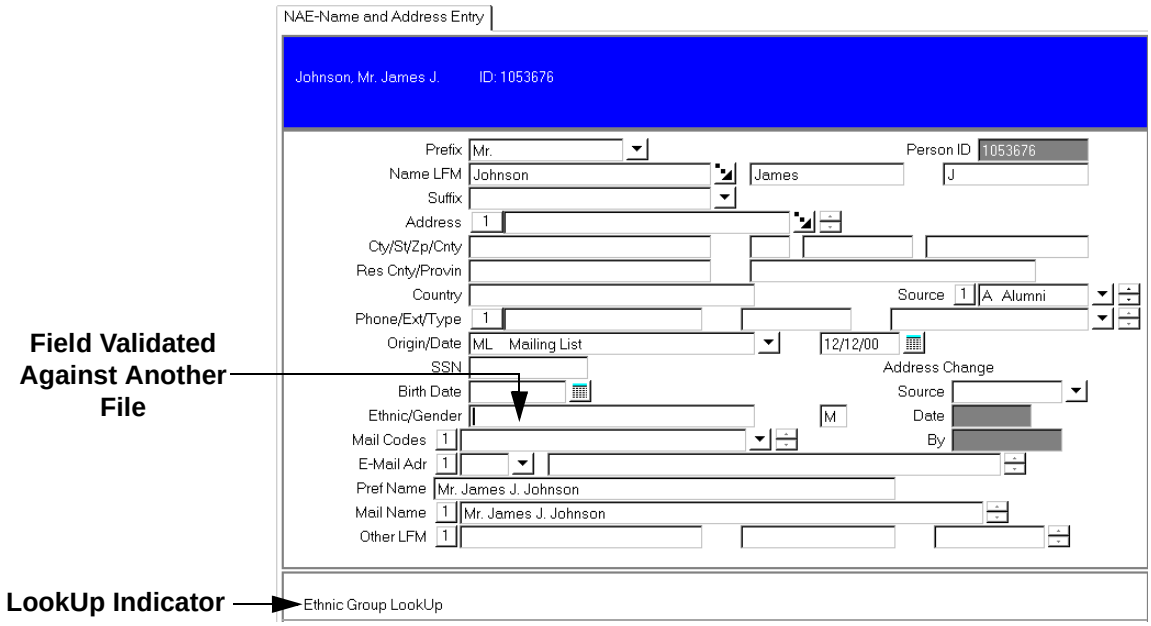


Figure 3-23: Example LookUp Indicator for a Field That Is Validated Against Another File

When you are using LookUp in a field that is not wide enough to display all the characters you want to enter, you can choose Wide Edit from the Edit drop-down menu. A LookUp dialog box is displayed, as shown in Figure 3-24.

Figure 3-24: Example of Using Wide Edit for LookUp

Note: You can use Wide Edit in any field, whether it involves LookUp or not, to provide additional display and editing space. The defined field size is the limiting factor for the number of characters you can enter.

Basic LookUp

If you know the ID, or key, for the record you need, you can simply enter it at the LookUp prompt. For example, James Smithfield's ID number is 1150. As shown in Figure 3-25, if you enter **`1150`** at the Person LookUp prompt for the Name and Address Maintenance (NAE) form, information about Mr. Smithfield is displayed.

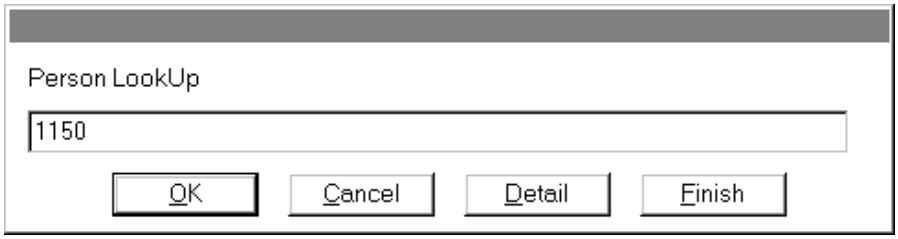


Figure 3-25: Basic LookUp

Beyond Basic LookUp

When you do not know the record ID or if you are adding a new record, LookUp provides a number of options that help you find the record or find out if one already exists using the information you do have. For example, if you do not know Mr. Smithfield's ID number, you can enter his last name at the Person LookUp prompt. As shown in Figure 3-26, if you enter "smithf" at the Person LookUp prompt for the Name and Address Maintenance form, a list of all the people in your database whose names begin with "Smithf" is displayed on a resolution screen.[1] You can then select James Smithfield from this list.

1. A resolution screen is a screen that displays a list of all records that match the search criteria you entered at the LookUp prompt.

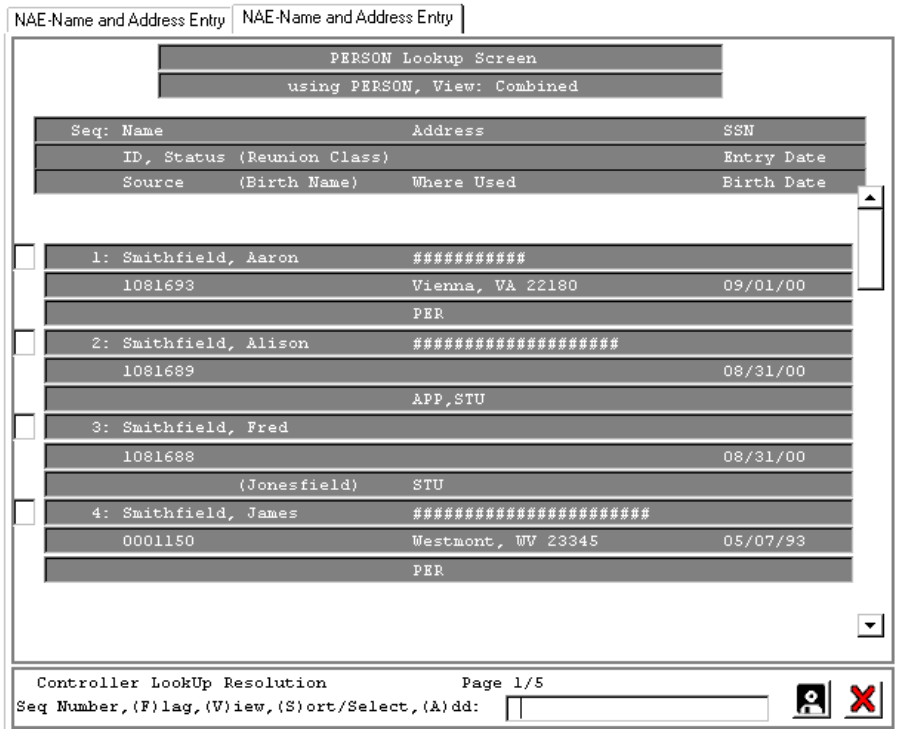


Figure 3-26: Resolution Screen

There are a number of LookUp options available to help you with almost all types of LookUp. In addition to these standard options, most types of LookUp provide special shortcuts to help you find what you are looking for. The standard LookUp options are presented in “Standard LookUp Options” below. The special shortcuts for specific types of LookUp are presented in your Benefactor or Colleague module documentation.

Person- and organization-related LookUps are a special case, and are found throughout Benefactor and Colleague. See “Special Options for Person- and Organization-Related LookUps” beginning on page 3-31 for more information.

Standard LookUp Options

As noted above, there are several LookUp options that work with most types of LookUp. LookUp options that do *not* work for person- and organization-related LookUps are noted in the “Hints” column in Table 3-1.

When you want to see...	Enter this at the LookUp prompt	Hints
The last record you displayed during this login session of the type that is appropriate for this form	An “at” sign (@) For example, both the Name and Address Maintenance (NAE) form and the Address Maintenance (ADR) form are people-related forms. If you displayed Fred Smith’s record on the NAE form and then you accessed the ADR form, you could retrieve Mr. Smith’s record on the ADR form simply by entering @.	The “at” (@) sign allows you to retrieve the last form-appropriate record you displayed in most, but not all, cases.
A list of all records appropriate for this form	An ellipsis (`...`)	The ellipsis is not supported for Person and Org LookUp.
A list of fields in the file that contains the record you are seeking	A semicolon (`;`)	You can use the field names to construct a query statement to look for the record you are seeking.
All records in which a specific field contains a value (that is, the field is not blank)	**`;fieldname`** For example, on the Approvals Needed (APRN) form in the Financial System’s Accounts Payable module, if you wanted to see a list of approval records for individuals who are limited in the purchase order amount they may approve, you would enter the following: **`;apprv.po.max.amt`**	
All records in which a specific field’s value matches a particular string	**`;fieldname string`** For example, on the Approvals Needed (APRN) form in the Financial System’s Accounts Payable module, if you wanted to see a list of approval records for individuals who can approve up to $10,000 on a purchase order, you would enter the following: **`;apprv.po.max.amt 10000`**	Text values, such as “Hall,” are often case-sensitive. With the exception of a person’s name, multiword values must be enclosed within double quotes. You can also look for multiple values at one time. For example, if you wanted to see a list of approval records for individuals who can approve up to $10,000 or up to $15,000 on a purchase order, you would enter the following: **`;apprv.po.max.amt 10000 15000`**

Table 3-1: Standard LookUp Options

When you want to see...	Enter this at the LookUp prompt	Hints
All records in which a specific field's value begins with a particular string	**`;field string...`** For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, if you wanted to see a list of all job skill definitions whose descriptions began with the word "Typing" or "Type," you would enter the following: **`;jsk.desc Typ...`**	Use this option when you are not sure how the item you are looking for is spelled or worded but you know how it starts. Remember that text values, such as "Typ," are often case-sensitive.
All records in which a specific field's value contains a particular string	**`;fieldname ...string...`** For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, if you wanted to see a list of all job skill definitions whose descriptions had the word "Typing" or "Type" in them, you would enter the following: **`;jsk.desc ...Typ...`**	Use this option when you are not sure how the item you are looking for is spelled or worded but you know that it contains a certain word or part of a word. Remember that text values, such as "Typ," are often case-sensitive.
All records in which a specific field's value ends with a particular string	**`;fieldname ...string`** For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, if you wanted to see a list of all job skill definitions whose descriptions ended with the word "Wpm," you would enter the following: **`;jsk.desc ...Wpm`**	Use this option when you are not sure how the item you are looking for is spelled or worded but you are fairly certain about how it ends. Remember that text values such as "Wpm," are often case-sensitive.

Table 3-1: Standard LookUp Options (cont'd)

When you want to see...	Enter this at the LookUp prompt	Hints
All records in which a specific file's value contains several strings	**`;fieldname ...string1...string2`** or any combination of strings and ellipses to achieve the desired result. For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, if you wanted to see a list of all job skill definitions whose descriptions contained the word "Typing" followed by the number "80," you could enter the following: **`;jsk.desc ...Typing...80...`**	Use this option when you are not sure how the item you are looking for is spelled or worded but you know that it contains certain words or parts of words. You can use any combination of ellipses and strings to find what you are looking for. Remember that text values, such as "Typing," are often case-sensitive.
All records in which a specific field's value is related in some way to a particular string (for example, is greater than or less than something)	**`;fieldname operator string`** The following are valid operators: • **`=`** or **`EQ`** (equal) • **`<>`** or **`NE`** (not equal) • **`>`** or **`GT`** (greater than) • **`>=`** or **`GE`** (greater than or equal to) • **`<`** or **`LT`** (less than) • **`<=`** or **`LE`** (less than or equal to) • **`UNLIKE`** (use this operator only when you use an ellipsis in specifying a data value) For example, on the Approvals Needed (APRN) form in the Financial System's Accounts Payable module, if you wanted to see a list of approval records that were added on or after January 1, 1999, you would enter the following: **`;approvals.add.date ge 010199`**	

Table 3-1: Standard LookUp Options (cont'd)

You can also string together several LookUp criteria. For example, on the Campaign Planning (CMP) form in the Alumni and Development System's Campaign Management module, if you wanted to find the campaigns that start in March *and* that have a campaign goal of $10,000 or more, you would enter the following:

```
;activity.donation.goal ge 10000 ;activity.start.month 3
```

Special Options for Person- and Organization-Related LookUps

The information most commonly used to look for a person or organization is the name of the person or organization. Table 3-2 presents the LookUp options you can use with person- and organization-related LookUps.

When you want to...	Enter this at the LookUp prompt	Hints
Search using a person's name	**lastname** (at least the first two letters) **lastname, firstname** **lastname, firstname middlename** **lastname, firstname middleinitial** **firstname lastname** **firstname middlename lastname** **firstname middleinitial lastname** For example, to look for or add a new person with the name of Robert Taylor Smith, you could enter any of the following: **sm** **smi** **smith** **smith, robert** **smith, robert** **smith, robert taylor** **smith, robert t** **robert smith** **robert taylor smith** **robert t smith**	You must enter an underscore (_) between the parts of multiword names. For example, **van_dyke, jo_anne** You can also enter only the beginning of the first and last names (at least the first two letters of the last name). For example, **sm, ro** **ro sm** LookUp finds any record with a primary, birth, former, or other name like the name entered. If you choose to add a new record after looking someone up by his or her name in this manner, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately; for example, if you enter **van_dyke, jo_anne**, you would get "Jo Anne Van Dyke."

Table 3-2: Person- and Organization-Related LookUp Options

When you want to...	Enter this at the LookUp prompt	Hints
Limit a name search	Enter any of the following after the name: **`;c city`** **`;st state/province`** **`;z zipcode/postalcode`** **`;f country`** **`;y class`** **`;s source`** **`;ps status`** For example, if you wanted to find the Robert Smith whose preferred address is in Boston, you could enter the following: **`robert smith ;c boston`**	You can string together more than one restriction for a search, as long as you separate each element of the search with a semicolon. For example, if you wanted to find the Robert Smith whose preferred address is in Boston and who is associated with the reunion class of 1954, you could enter the following: **`robert smith ;c boston ;y 1954`**
Preserve capitalization as entered when adding a new person	**`=name`** For example, if you enter **`=JoAnne T di_Marco`**, then the name displays exactly as you entered it. If you entered only **`joanne t di_marco`**, then the name would have been capitalized as follows: Joanne T. Di Marco.	If the name is not preceded by an equal sign, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately.
Who has a particular Social Security or Social Insurance number	**`;ss SSN/SIN`** For example, Mary Browning's Social Security number is 264-99-8765. If she gave you her Social Security number instead of her ID number, you would enter the following to look her up: **`;ss 264998765`**	You may enter hyphens, but they are not necessary.

Table 3-2: Person- and Organization-Related LookUp Options (cont'd)

When you want to...	Enter this at the LookUp prompt	Hints
Search using an organization's name	**`orgname`** For example, to look for or add a new organization with the name of Universal Office Supplies, you could enter any of the following: **`universal`** **`office`** **`supplies`** **`universal office`** **`universal office supplies`**	If you choose to add a new record after looking up an organization by its name, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately; for example, if you entered universal office supplies, then you would get "Universal Office Supplies."
Preserve capitalization as entered when adding a new organization	**`=orgname`** For example, if you enter **`=e e cummings Institute`**, then the name will be displayed exactly as you entered it. If you had entered only e e cummings Institute, then the name would have been capitalized as follows: **`E E Cummings Institute`**	If the name is not preceded by an equal sign, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately.
Limit a name search	Enter any of the following after the name: **`;c city`** **`;st state/province`** **`;z zipcode/postalcode`** **`;f country`** For example, if you wanted to find the Universal Office Supplies in Dayton, you could enter the following: **`universal ;c dayton`**	

Table 3-2: Person- and Organization-Related LookUp Options (cont'd)

Working with a Group of Records

When you want to review or work with a set of records on a given form, you can select a group of records directly from a resolution screen, as shown in Figure 3-27.

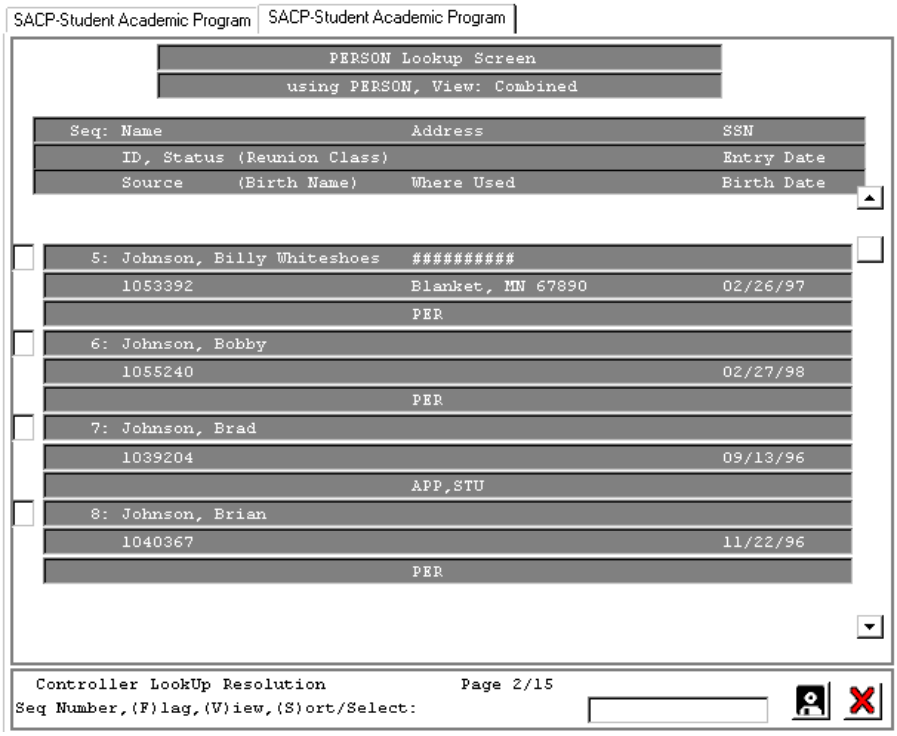


Figure 3-27: Resolution Screen

You can select a group of records in either of two ways

- Click the box to the left of each desired record to highlight it.
- Use the keyboard to enter **F**(lag) in the controller lookup resolution box, followed by each record number you want to select. Each selected record is highlighted as soon as you press Enter.

When you have selected all the records you want, click the Save button at the bottom of the resolution screen, click the Save button on the User Interface 1.0 toolbar, choose Save from the File menu, or type **`Alt-F-S`**. User Interface 1.0 displays the first of your selected records on the form. You can make changes, save, and exit. You can then display the next record or jump to another record in the group. User Interface 1.0 shows which record is currently displayed at the bottom of the form, as shown in Figure 3-28.

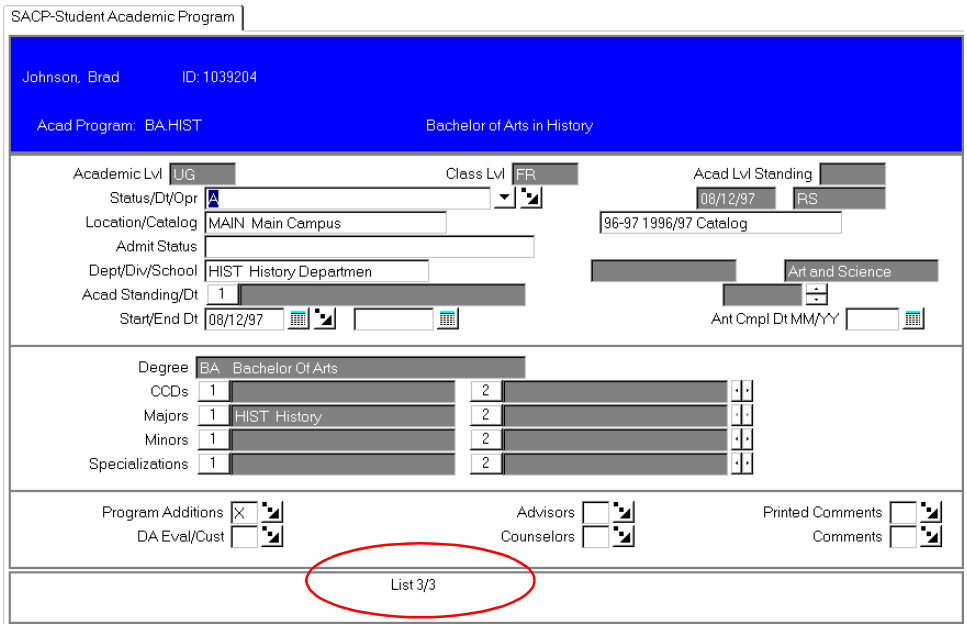


Figure 3-28: Displaying One Record of a Group

Cycling Through A Selected Group of Records

To cycle through the records in a group, save or cancel changes to the currently displayed record.

Saving a Record and Displaying Another Record

Perform the following steps to save the current record and display another record in the selected group:

Step 1. Click the Save button, or press **`Alt-F-S`**. An alert box prompts you to update, cancel or return to editing, as shown in Figure 3-29.

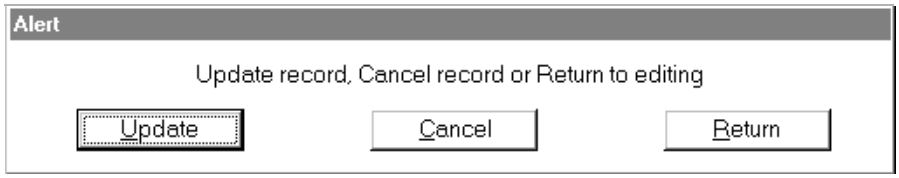


Figure 3-29: Alert Dialog Box: Update, Cancel, or Return

Step 2. Click the Update button, press Enter, or type **U** to choose Update. An alert box is displayed, as shown in Figure 3-30.

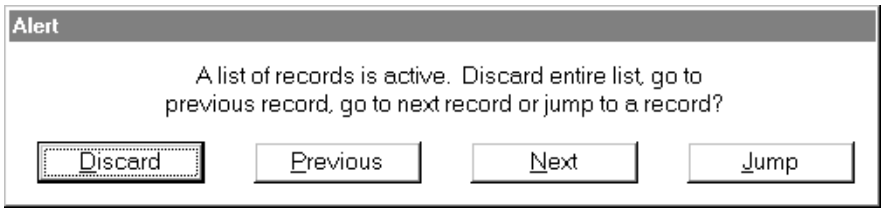


Figure 3-30: Alert Dialog Box: Discard, Previous, Next, or Jump

Step 3. Choose one of the following actions:

- Click Previous or type **P** to move to the previous record in the list
- Click Next or type **N** to move to the next record in the list
- Click Jump or type **J** to select a specific record in the list

If you do not want to edit any more records in the list, click Discard, press Enter, or type **D** to discard the entire list.

Canceling Your Changes and Displaying Another Record

Perform the following steps to cancel your changes to the current record and display another record in the selected group:

Step 1. Click the Cancel button, or press **Alt-F-C**. An alert box prompts you to cancel or return to editing, as shown in Figure 3-31.

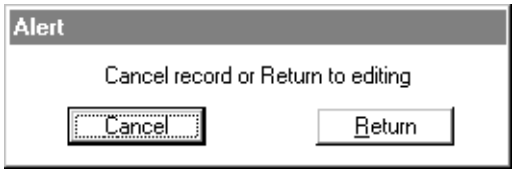


Figure 3-31: Alert Dialog Box: Cancel or Return

Step 2. Click the Cancel button, press Enter, or type **C** to choose Cancel. An alert box is displayed, as shown in Figure 3-30 on page 3-37.

Step 3. Choose one of the following actions:

- Click Previous or type **P** to move to the previous record in the list
- Click Next or type **N** to move to the next record in the list
- Click Jump or type **J** to select a specific record in the list

If you do not want to edit any more records in the list, click Discard, press Enter, or type **D** to discard the entire list.

Running Batch and Report Processes

When you run batch and report processes, the Progress Bar Graph displays the progress of each process.

As each process is completed, a Finish prompt displays. You can click the Finish button to start and view the progress of the next process. Continue clicking Finish as each prompt appears.

If you wish to view all of the processes consecutively (without having to click Finish for each process), select the “Close automatically when complete” box.

There are four types of progress bar graphs.

Message Bar Graph

Displays on the messages of a process, without the progress bar.

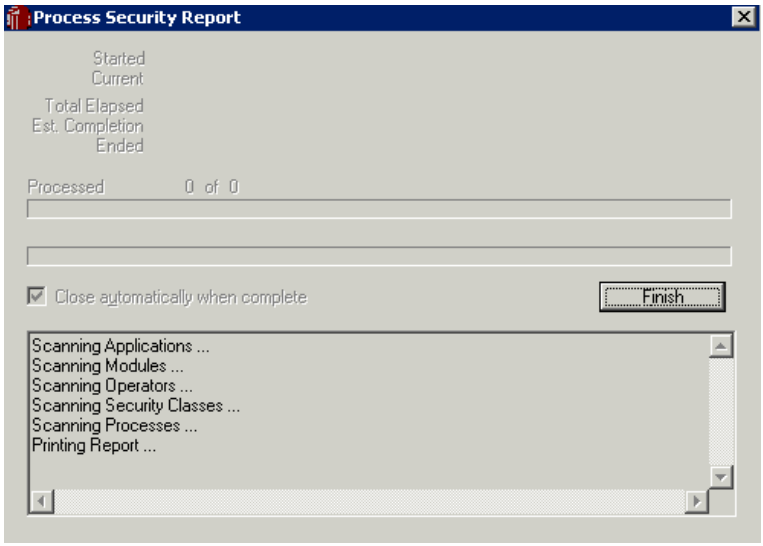


Figure 3-35: Message Bar Graph

Single-Process Bar Graph

Displays a single process in a bar graph.

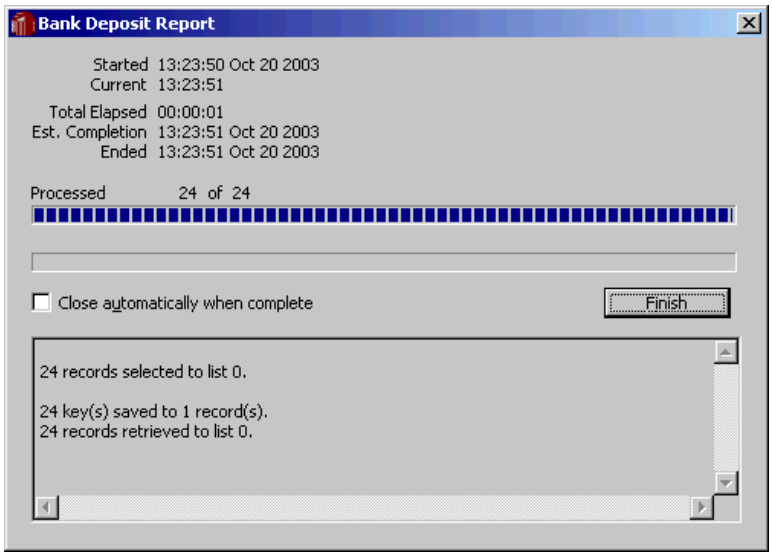


Figure 3-36: Single-Process Bar Graph

Multiple-Process Bar Graph

Displays more than one process in multiple bar graphs.

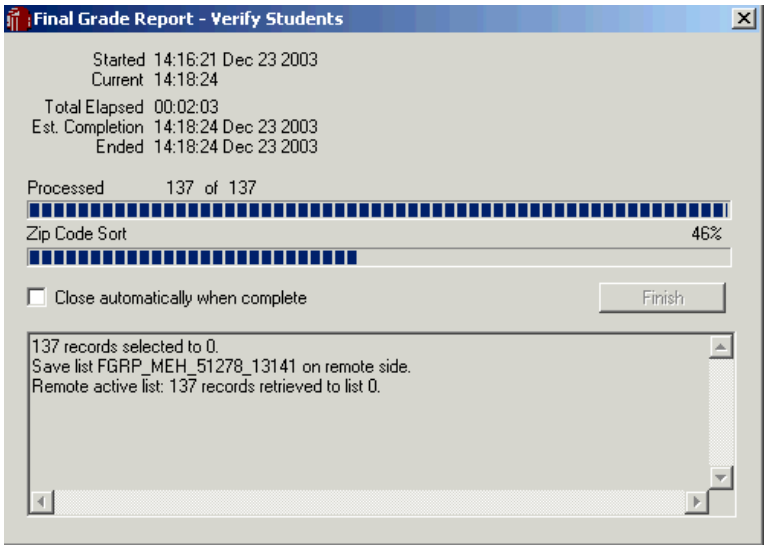


Figure 3-37: Multiple-Process Bar Graph

Terminal Window Bar Graph

Displays GEN and Painter processes. Your system administrator can optionally choose to display all of your bar graphs in a Terminal Window. By electing to use the Terminal Window Bar Graph, you no longer have the option to view the progress of each process.

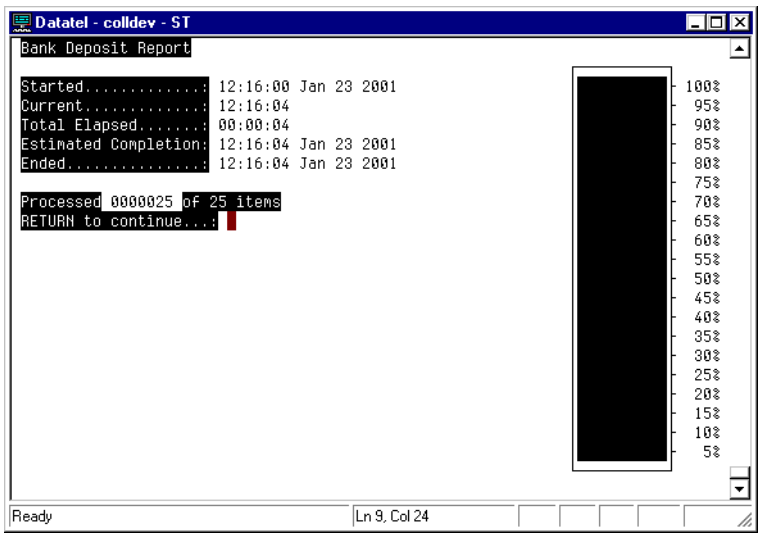


Figure 3-38: Terminal Window Bar Graph

Browsing Reports

The User Interface 1.0 Report Browser allows you to view reports easily in a Windows environment. During viewing, the browser imports the document one page at a time as requested, so that lengthy download times are avoided.

Note: Because the Report Browser brings the report to the client one page at a time, there is a delay of approximately a second between clicking a page selection button and displaying the page on the screen.

To use the Report Browser, perform the following steps:

Step 1. Select the desired report from the tree menu.

Step 2. Fill in the desired report parameters, as shown in Figure 3-39, and update.

.

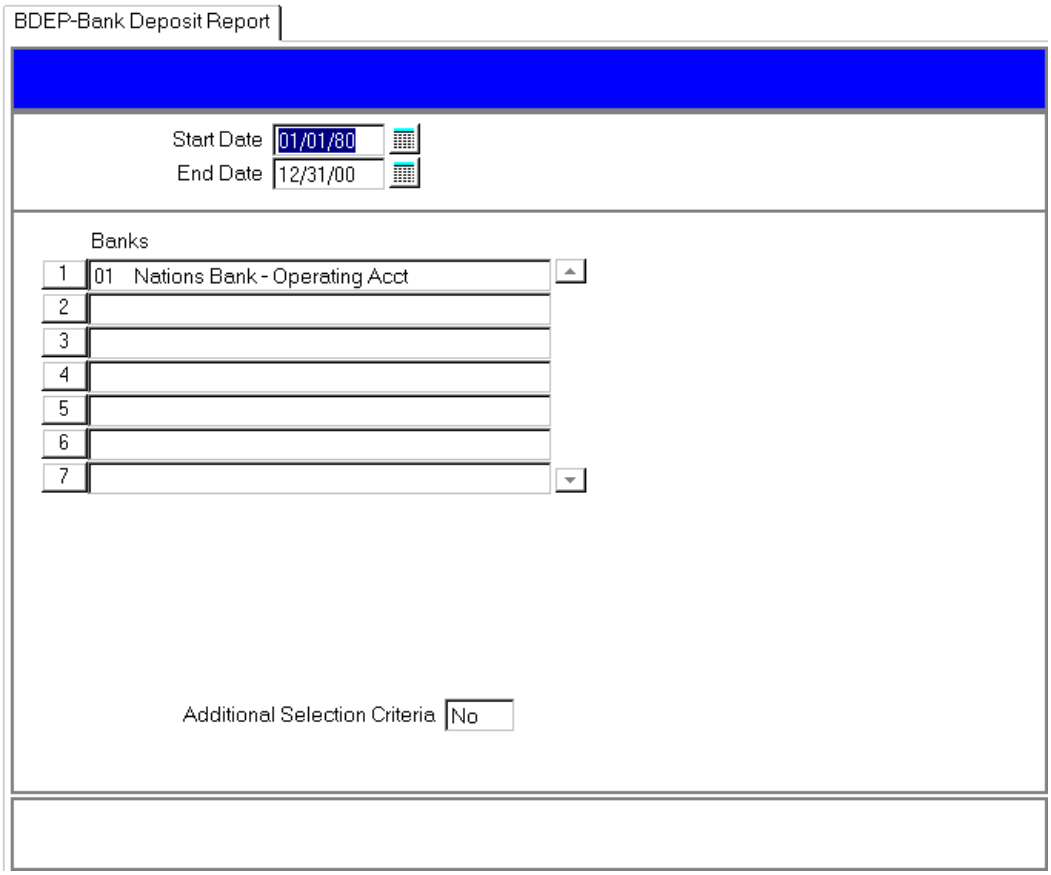


Figure 3-39: Bank Deposit Report (BDEP) Form

Step 3. Update from the first screen and select **`H Hold/Browse File Output`** from the Output Device drop-down menu, as shown in Figure 3-40.

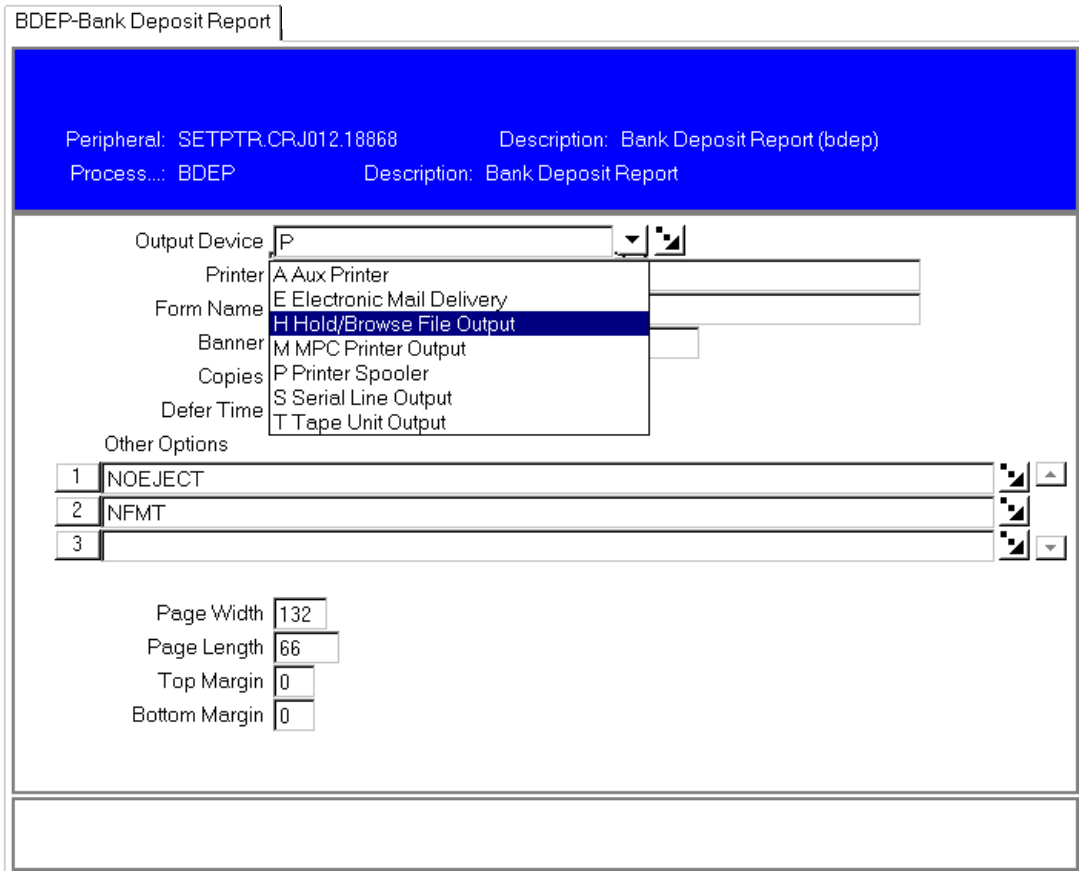


Figure 3-40: Output Device Drop-Down Menu

Step 4. Continue updating until the Progress Bar Graph is displayed. (See “Running Batch and Report Processes” on page 3-42.)

Step 5. When all records are processed, you are prompted to browse the HOLD files. The Report Browser is displayed. Figure 3-41 shows a typical report page in the Report Browser.

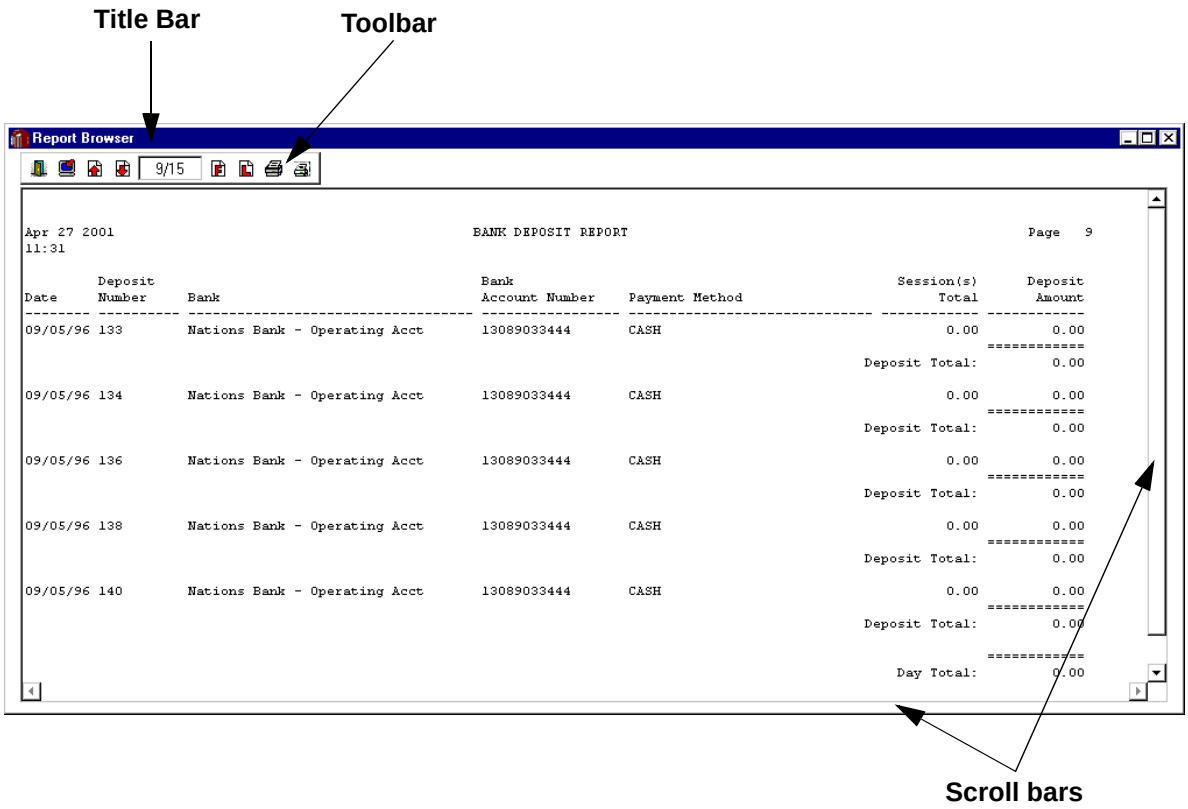


Figure 3-41: Report Browser

Using the Report Browser Toolbar

Use the toolbar buttons, shown in Figure 3-42, to navigate through the report, print the report, or save a copy.

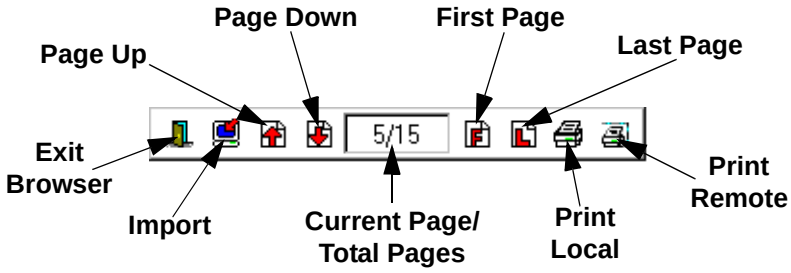


Figure 3-42: Report Browser Toolbar Detail

- Click the Exit Browser button to close the Report Browser and return to the application workspace.
- Click the Import button to save a copy of the report to your local hard drive. You are prompted to specify a name and path for the saved report.
- Click the Page Up button to move to the previous page of the report.
- Click the Page Down button to move to the next page of the report.
- Click the First Page button to jump to the first page of the report.
- Click the Last Page button to jump to the last page of the report.
- Click the Print Local button to print the report to a local printer, *i.e.*, a printer that is accessible from Windows. This option downloads the report to your PC and uses Windows to print the report. When you select Print Local, a Printer Setup dialog box is displayed.

Note: For best results with the Print Local option, you must choose an appropriate font size and page orientation. If the font is too large, the report may not page properly or may be truncated short of the right margin.

For reports that are up to 80 characters wide, click the Use Font check box on the printer setup dialog and choose Courier New, 10. Click the radio button for Portrait orientation.

For reports that are from 81 to 132 characters wide, click the Use Font check box on the printer setup dialog and choose Courier New, 8. Click the radio button for Landscape orientation.

In all cases, make sure that the Use character mapping check box is checked.

- Click the Print Remote button to print the report to a printer that is accessible from the host. This option uses the operating system on the host to print the report, without downloading it to your PC.
- The Current Page/Total Pages box 5/15 shows the number of the currently displayed page and the total number of pages in the report.

Setting Report Browser Preferences

You can resize the browser window to fit any selected report. If the entire report does not fit on the screen, vertical and horizontal scroll bars enable you to view any part of it, as shown in Figure 3-41 on page 3-47. To customize the

font, background color, and text color, choose Font or Change Colors from the Options menu. See “Defining Your Preferences” beginning on page 3-52 for information on setting report browser colors and fonts.

Getting Help

There are three categories of online Help:

- **Field Help** provides an explanation of each field on each form.
- **Function Help** provides a list of frequently used keyboard shortcuts.
- **Process Help** provides an overview of each form.

Note: In addition, the About option in the Help menu enables you to view version and licensing information.

Field Help

To access field help while working in a form, click on the field for which you would like help, and do one of the following:

- Choose Field Help from the Help drop-down menu, or
- Click the Field Help button ? on the toolbar.

Function Help

Keyboard Shortcuts are keystroke combinations that can be used to perform functions which are normally accessed by using the mouse in Windows.

To access a list of frequently used keyboard shortcuts from any location within a form, choose Function Help from the Help drop-down menu. The Help and Function Key Information box is displayed, as shown in Figure 3-43.

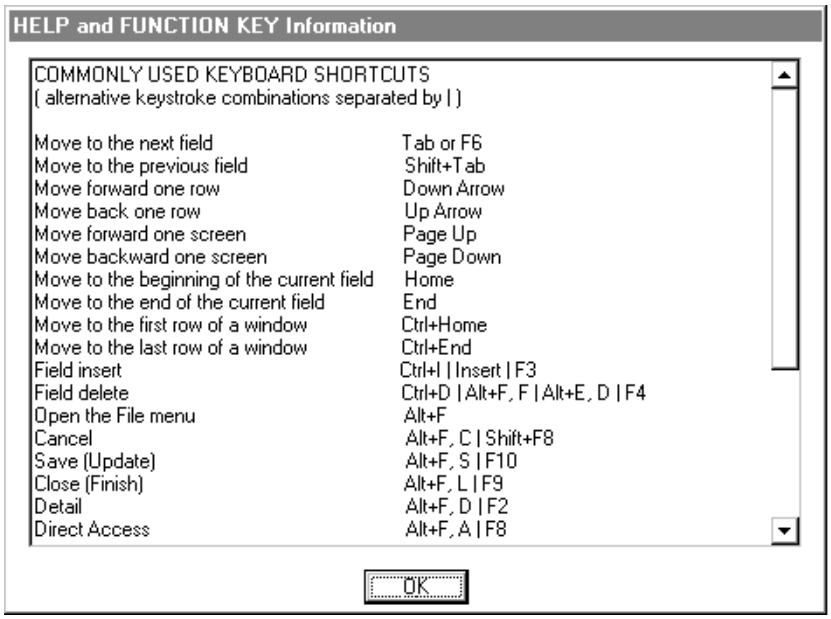


Figure 3-43: Help and Function Key Information Box

Because the twelve function keys are programmed to operate differently at different sites and users may be confused by the default key assignments in UI 1.0, there is an option to disable these function keys. Access the UI Parameters Edit (UIPR) form and set the Disable Function Keys field to Yes. The default is “No.”

Process Help

To access process Help from any location within a form, choose Process Help from the Help drop-down menu.

Defining Your Preferences

Fonts

You can change the fonts in used in the forms, reports, resolution screens, and the multi-line text editor by using the Fonts dialog box.

Note: For best results, we recommend that you configure your Windows display to use small fonts. With lower resolutions, such as 800x600, some forms and resolution screens may not be displayed correctly using large fonts.

Follow these steps to define your font preferences:

Step 1. From the Options menu, choose Font. The Font dialog box is displayed, as shown in Figure 3-44.

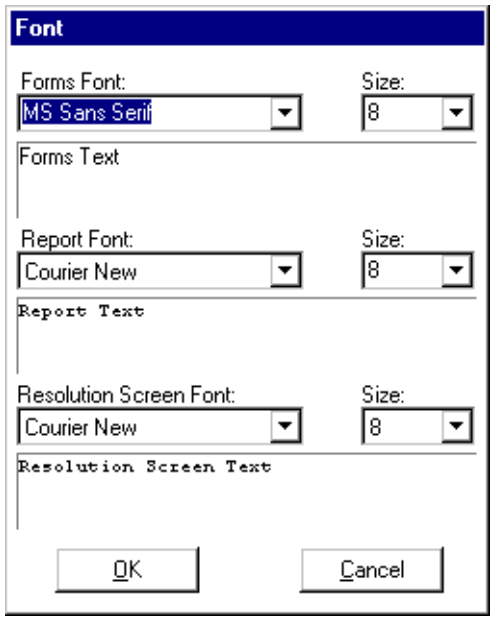


Figure 3-44: Font Dialog Box

Step 2. Use the drop-down lists to set the font styles and sizes individually for forms, reports, and resolution screens. Click **OK** to save the settings. The new settings will take effect the next time you start User Interface 1.0.

Note: If you want to use a font that is available on your PC but not included in a drop-down list, type the font name into the edit field. If the font is available, the sample text below the edit field adjusts to the new setting. If the sample text does not change, the font is not valid.

User Interface 1.0 supports proportional fonts; however, resolution screens and the Report Browser require the use of fixed fonts because of the precise formatting of their output. For these fonts, you are restricted to the values supplied in the drop-down list.

Note: The font you sent for the resolution screen is the same font that will be used by the multi-line text editor. For information about the multi-line text editor, see “Field Customization” on page 3-64.

Colors

Follow these steps to define your color preferences:

Step 1. From the Options menu, choose Change Colors. The Visual Attributes dialog box is displayed, as shown in Figure 3-45.

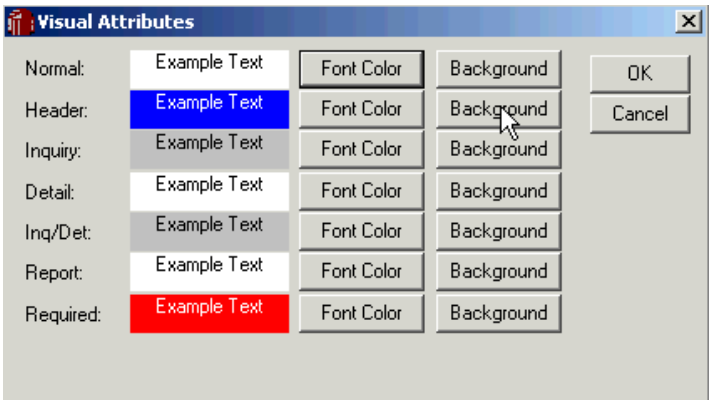


Figure 3-45: Visual Attributes Dialog Box

Step 2. The Visual Attributes dialog box allows you to change any foreground or background color setting. Click **Font Color** or **Background** to the right of the Example Text for the color you want to change. A color palette is displayed, as shown in Figure 3-46.

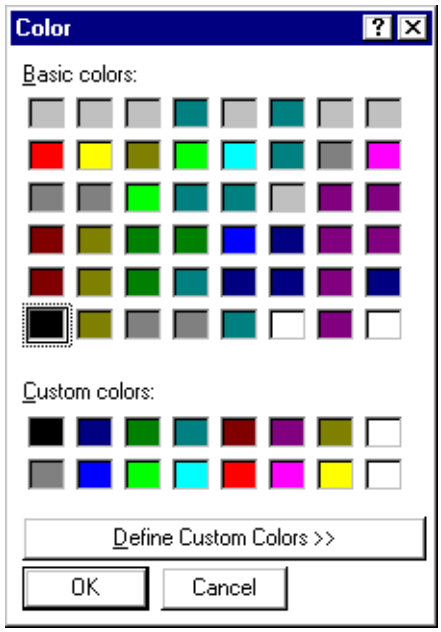


Figure 3-46: Color Palette

Step 3. Select the color you want, and click **OK** to save the setting and return to the Visual Attributes dialog box.

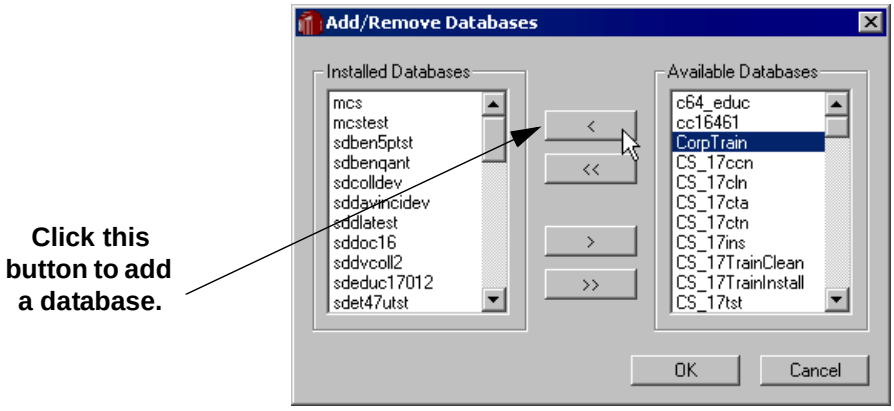
Step 4. When all color selections are complete, click **OK** in the Visual Attributes dialog box to save the settings.

Adding a Database

You can add a database in either of two ways: from the Options menu in User Interface 1.0, or from the Datatel User Setup program. Use this procedure if you are adding a database from the Options menu in User Interface 1.0. If, instead, you are adding a database from the Datatel User Setup program, refer to *UI 1.0 Installation and Administration*.

Step 1. From the Options menu in User Interface 1.0, select Add/Remove Databases.[2]

The Add/Remove Databases box is displayed.



Step 2. Identify the available database(s), listed in the Available Databases window, that you want this user to be able to access through User Interface 1.0. Move each of those databases to the Installed Databases window by selecting the database and then clicking the single left arrow button.

Step 3. Click OK to add the databases.

2. If the "Add/Remove Databases" option does not appear on the Options menu, it may have been disabled for you. Contact your system administrator.

Favorites

You can use the Favorites drop-down menu to store and organize a list of shortcuts to frequently used forms and functions.

Adding Favorites

Perform the following steps to add a form shortcut to your Favorites list:

Step 1. In either panel, right-click the form that you want to add to your list of Favorites. A popup window prompts you to add the item to Favorites, as shown in Figure 3-47.

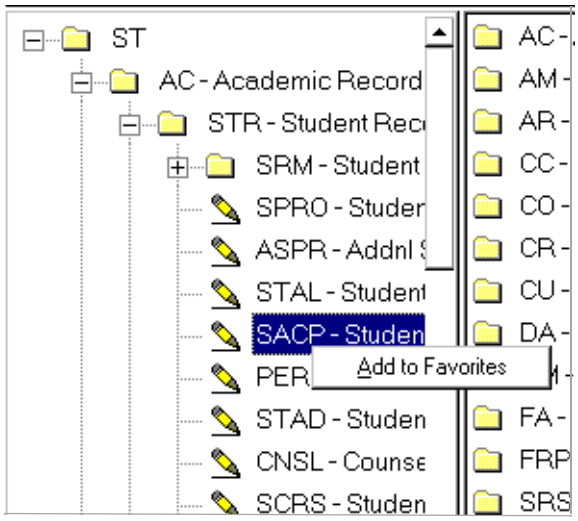


Figure 3-47: Menu Item Selected By Right-Clicking

Step 2. Click the **Add to Favorites** popup. The Enter a Mnemonic dialog box is displayed with the mnemonic for the selected form filled in, as shown in Figure 3-48.

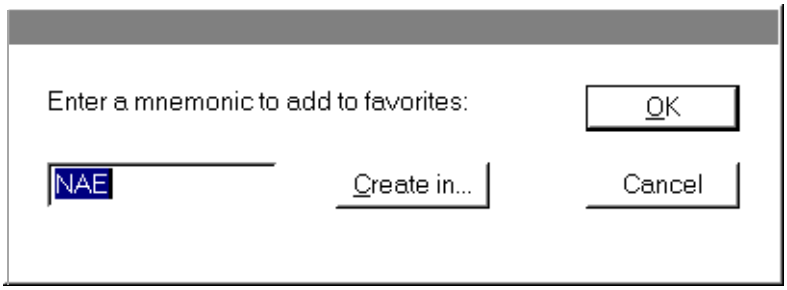


Figure 3-48: Enter a Mnemonic Dialog Box

Step 3. Click **OK** to add the form to your customized Favorites list. If you use folders to organize your Favorites, you can click **Create in** to select an existing folder or create a new folder for the shortcut, as shown in Figure 3-49.

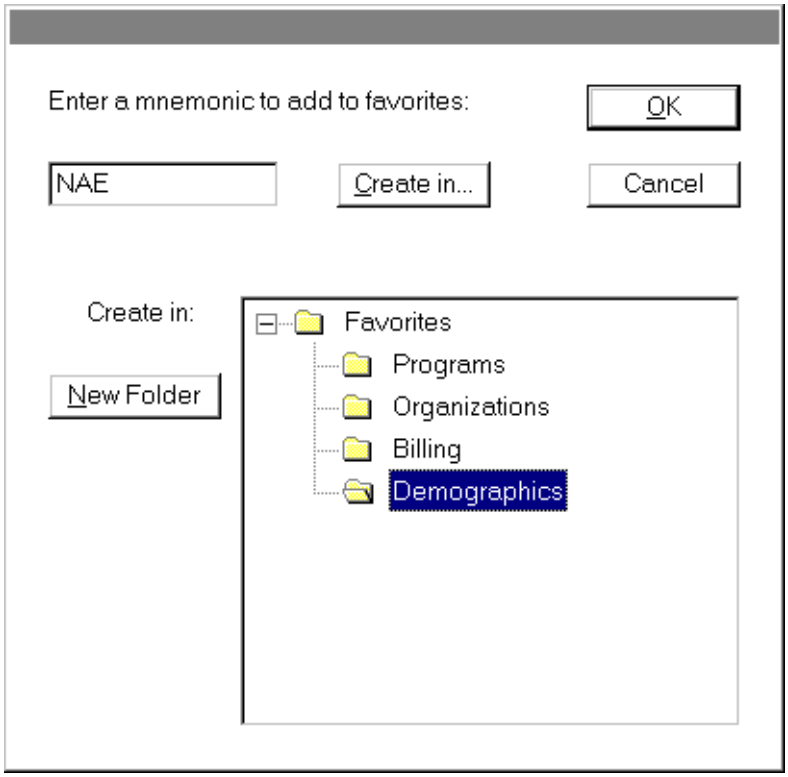


Figure 3-49: Selecting a Folder for a Favorite

Note: See “Organizing Favorites” beginning on page 3-58 for more information on organizing Favorites in folders.

Step 4. The shortcut is added to your Favorites drop-down menu, as shown in Figure 3-50.

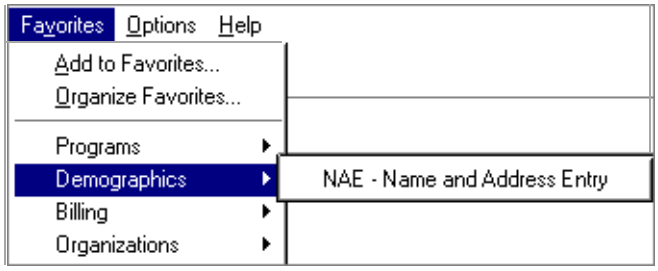


Figure 3-50: Favorites Drop-Down Menu

Note: To display the Enter a Mnemonic dialog box and add a shortcut to Favorites without first selecting the form from the tree menu, choose Add to Favorites from the Favorites menu and enter the mnemonic of the desired form.

If you have a form open and want to add it to your Favorites list, choose Add Current Screen to Favorites from the Edit menu. The Enter a Mnemonic dialog box is displayed with the current form mnemonic filled in, as shown in Figure 3-48 on page 3-57.

Organizing Favorites

Choose Organize Favorites from the Favorites menu to manage your list of shortcuts. You can create new folders, rename folders, delete unwanted folders, remove forms from Favorites, and move items from one folder to another.

Note: A form cannot be renamed. However, you can create a folder with a descriptive name that will help you remember the form's function, and then store the form shortcut in the folder. Folders can be used to classify forms by function, workflow, or any other property.

Creating a New Folder. Perform the following steps to create a new folder:

Step 1. Choose Organize Favorites from the Favorites menu. The Organize Favorites window is displayed, as shown in Figure 3-51.

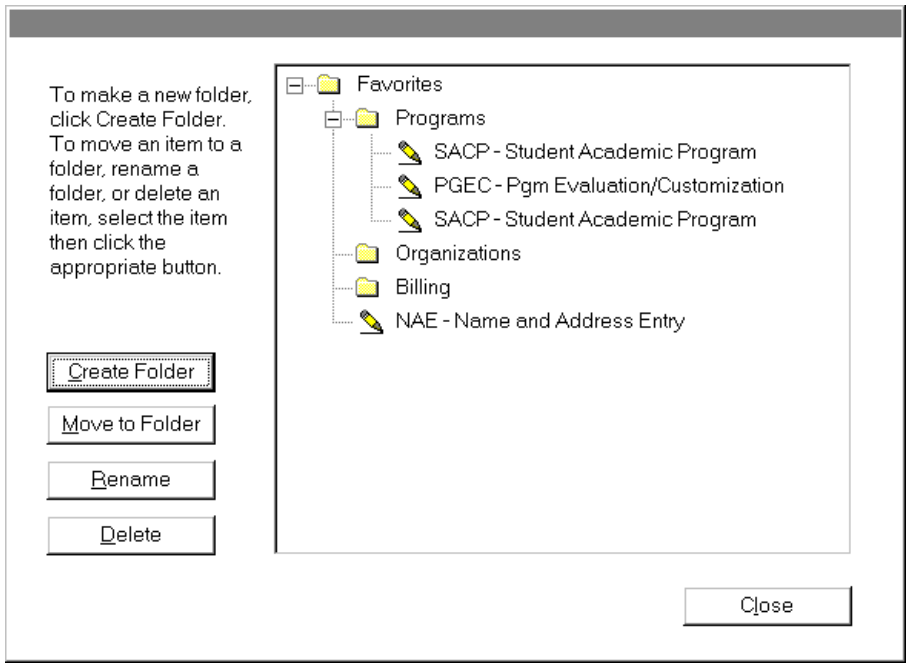


Figure 3-51: Organize Favorites Window

Step 2. Click **`Create Folder`** to display the Folder Name dialog box, as shown in Figure 3-52.

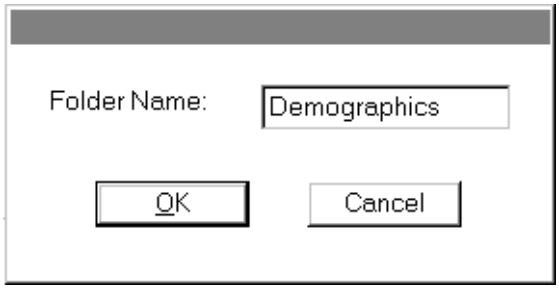


Figure 3-52: Folder Name Dialog Box

Step 3. Enter a name for the new folder, *e.g.*, “Demographics,” and click **`OK`**. The new folder appears in the Organize Favorites window, as shown in Figure 3-53.

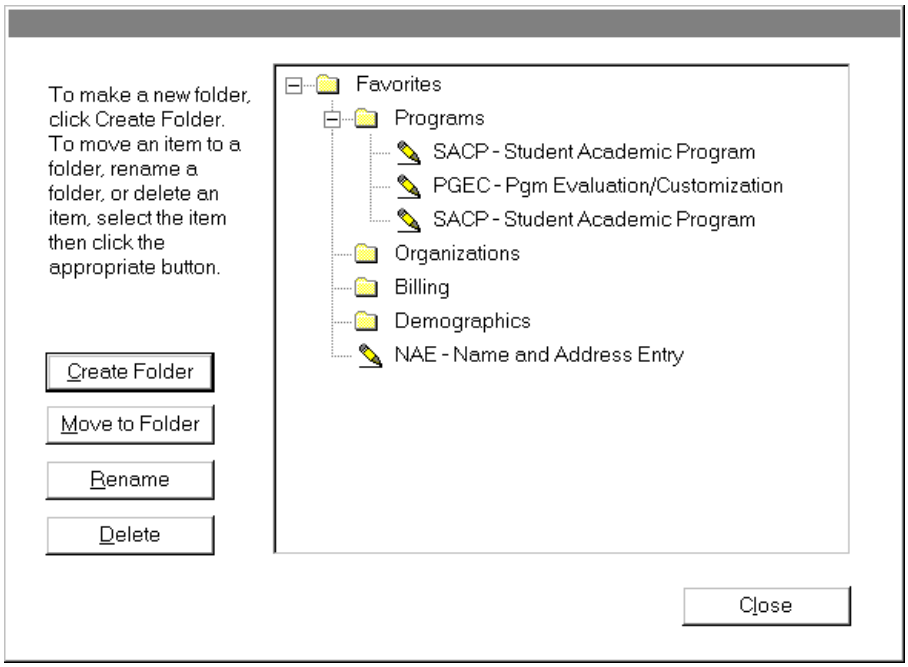


Figure 3-53: New Folder

Moving a Shortcut to a Folder. Perform the following steps to move a shortcut to a folder:

Step 1. In the Organize Favorites window, select the shortcut you want to move by clicking on it.

Step 2. Click **`Move to Folder`**. The Folder Selection window is displayed.

Step 3. Click on the desired folder to select it, as shown in Figure 3-54.

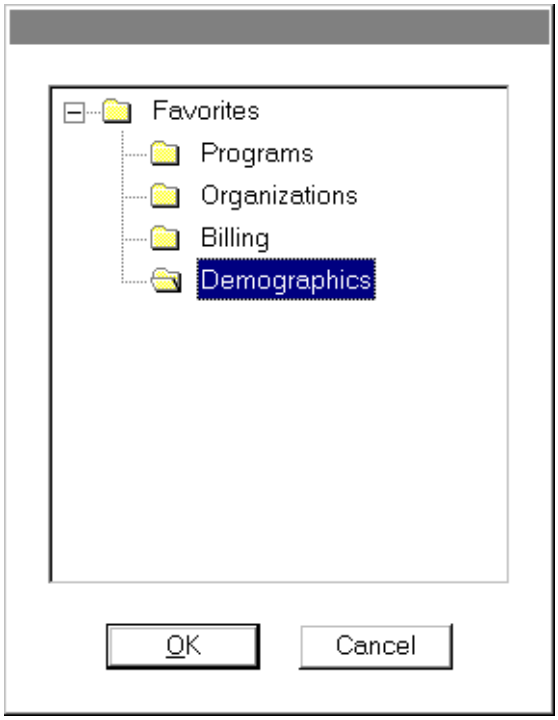


Figure 3-54: Folder Selection Window

Step 4. Click **OK**. The shortcut is moved to the folder, as shown in Figure 3-55.

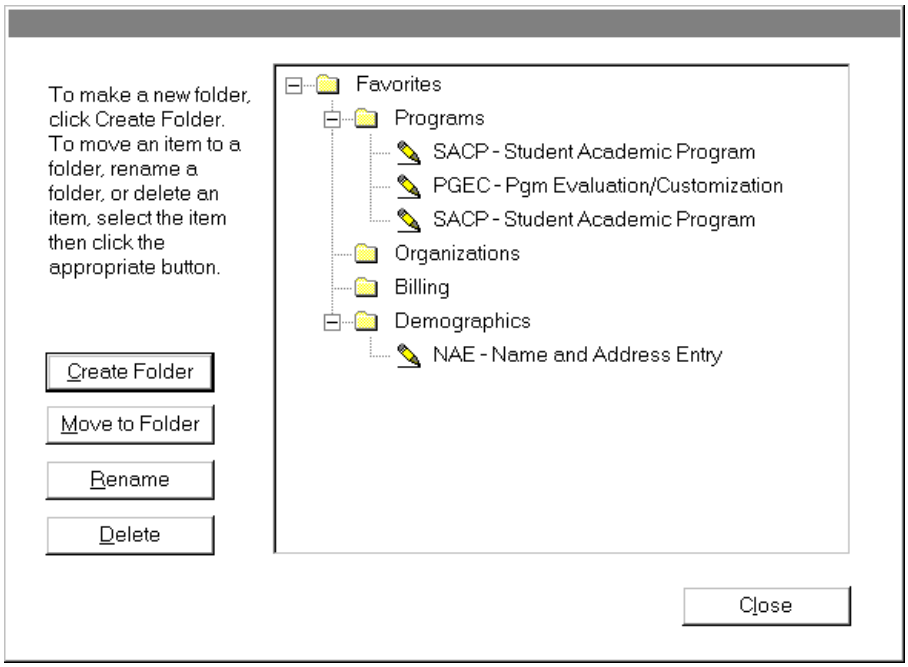


Figure 3-55: Shortcut Moved to Folder

Note: In addition to moving shortcuts, you can move folders into other folders to create a hierarchical structure.

Renaming a Folder. Perform the following steps to rename a folder:

Step 1. In the Organize Favorites window, select the folder you want to rename by clicking on it. Click **Rename**. The folder name is now editable.

Step 2. Enter the new folder name and click **Close** to close the Organize Favorites window and save the change. In Figure 3-56, the Demographics folder is renamed to Demographic Information.

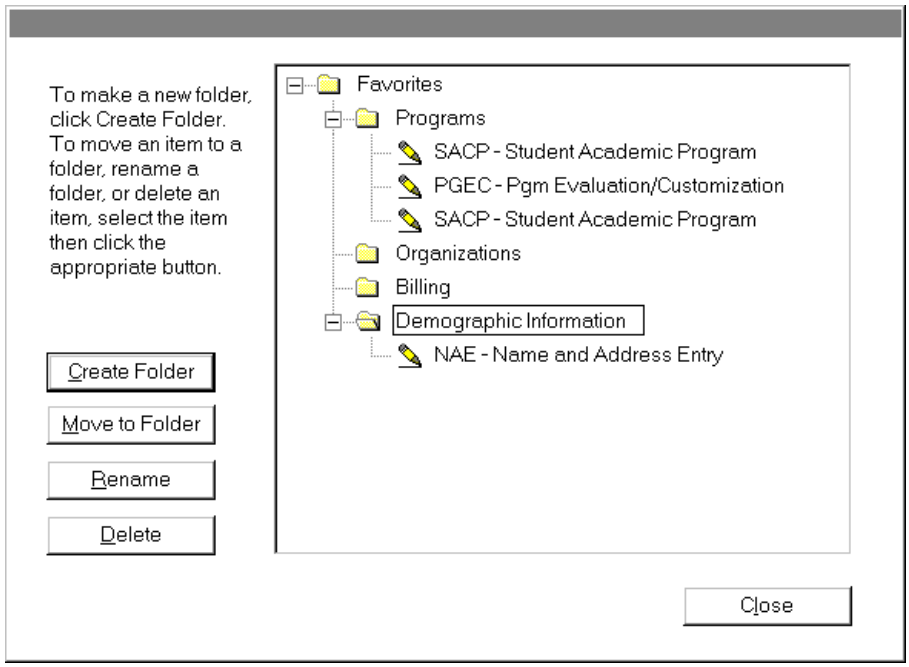


Figure 3-56: Renaming a Folder

Deleting a Shortcut or a Folder. Perform the following steps to delete a shortcut or a folder:

Step 1. In the Organize Favorites window, select the shortcut or folder you want to delete from Favorites by clicking on it.

Note: You cannot delete a folder unless it is empty. To delete a folder, first move or delete all of its contents.

Step 2. Click **`Delete`**. The shortcut or folder is removed from the Organize Favorites window and from the Favorites drop-down menu.

Note: When you delete the shortcut to a form from Favorites, the form is still accessible through the menus, the address bar, and the Run dialog box. You have only deleted the shortcut in the Favorites drop-down menu.

Field Customization

You can specify field behavior for a screen from within the screen itself. Selecting Customize Field Properties from the Tools menu of the screen you want to customize allows you to specify field sequence and field access for that screen.

- Field Sequence - Use the First Field, Next Field Override, and Last Field fields to specify which field the cursor appears in when a user first accesses the screen, and the path followed through the screen each time a user presses the TAB key.
- Field Access - Indicate which fields on the screen are required. You can also indicate if a field is Inquiry Only (the user can see the field, but cannot enter information) or No Access (the field is not visible to the user).

Keep in mind that the behavior for each field on each screen is originally defined by Datatel. System administrators can use the Envision Tool Kit to further define field behavior for an institution. You cannot take away behavior that is defined in the Tool Kit. For example, if a field is set in the Tool Kit as Required, it is always required.

The same reasoning applies to the Field Access feature. If a field is set in the Tool Kit as Inquiry-Only, you cannot set that same field to be editable. You also cannot set field access that conflicts with the Envision Tool Kit. For example, if a field is set in the Tool Kit as Required, you cannot set that field to be inquiry-only. Conversely, if a field is set as Inquiry Only in the Tool Kit, you cannot set that field to be Required. See “Rules for Field Customization” on page 3-66 for more information about these rules.

Note: Before you can customize fields for a screen, your system administrator must first enable field customization for you and set up your field customization preferences.

See Figure 3-57 for an example of the Customize Field Properties dialog. This example shows customization of the NAE screen, but any Envision screen can be customized.

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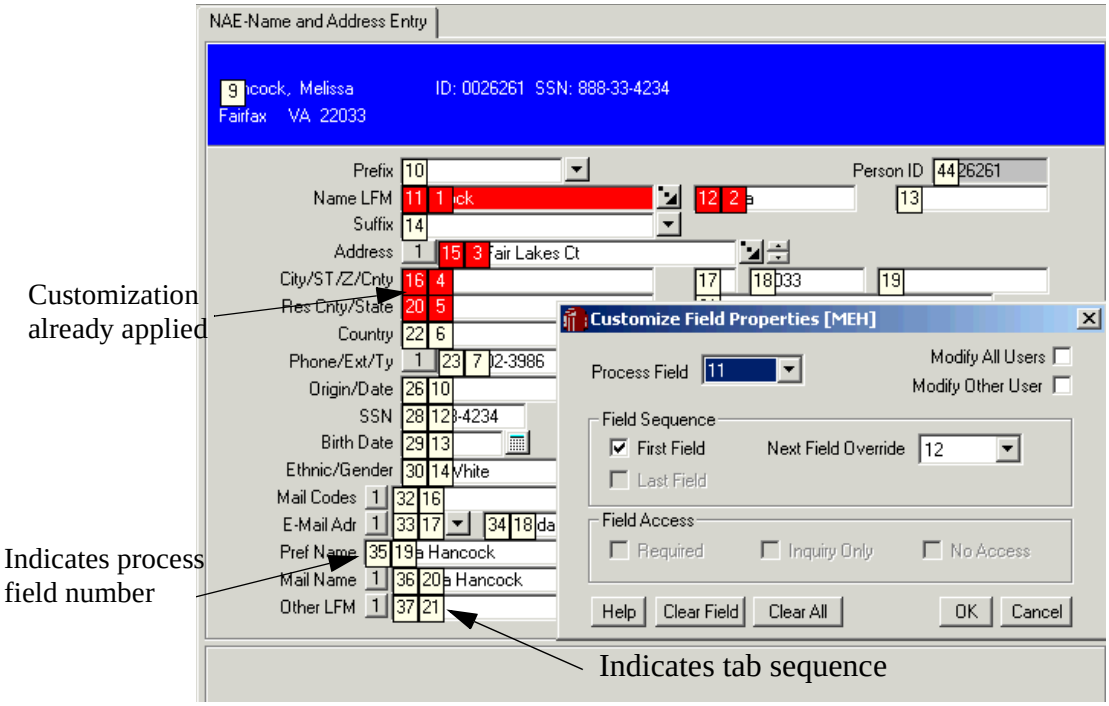


Figure 3-57: Customize Field Properties Dialog

Technical Tip: When you access the Customize Field Properties dialog from a screen, you can view existing customizations for that screen. A series of tool tips indicates the process number of each field, as well as the tab sequence of each field.

A tool tip field that is red indicates that customization is already applied to that field.

The system administrator can also use the User Field Customization (UIFC) screen to specify the behavior for fields on a screen.

Customizing Field Sequence

Customizing your field sequence can optimize the speed with which you move through a screen. You can specify the field you want to start in first and the order in which to visit each subsequent field. Each time you press the TAB key, you move to the next field in the specified tab sequence. When you leave the last field in your customized tab sequence, the screen updates.

If a next field override is not specified, the default sequence is used.

Customizing Field Access

Use the Field Access fields to select a security control override for the corresponding field. If these fields are left empty, the default User Interface form behavior occurs.

You can select one of the following options:

- Required: A field on a screen is required. Users cannot finish from the screen without entering data into the required fields.
- Inquiry Only: Users may only view the data; they cannot update or delete data.
- No Access: Users cannot view, add, change or delete data. If a field is already specified as Denied Access through security classes as defined on the Field Security Definition (SCDF) screen, it is always Denied Access (Denied Access performs the same functionality as No Access).

Rules for Field Customization

The behavior for each field on each screen is originally defined by Datatel. System administrators can use the Envision Tool Kit to further define field behavior for an institution. You cannot take away behavior that is defined in the Tool Kit. The following rules apply to Customize Field Properties fields:

Precedence

- Tab sequence precedence is exclusive. If one user creates a tab sequence and applies it to all users, a second user may still create a tab sequence for himself, and that tab sequence will apply only to the second user.
- Field access precedence is inclusive. If a one user restricts field access from a field for all users, and a second user restricts field access from a second field for himself, the second user will not be able to access either field. If the same field has access restrictions for both all users and a specific user, the most restrictive access is always used.

First Field

- A form can have only one First Field. Once a First Field is designated, you cannot make any other field the First Field unless you remove the existing designation.

Last Field

- Fields that contain a Next Field Override cannot be designated as the form's last field.

Next Field Override

- Fields that are specified as Last fields cannot have a Next Field Override.
- Invalid Next Field Override fields: fields contained in the header block, window fields that are not window controllers (unless the current Process Field is a member of the same window).

Field Access

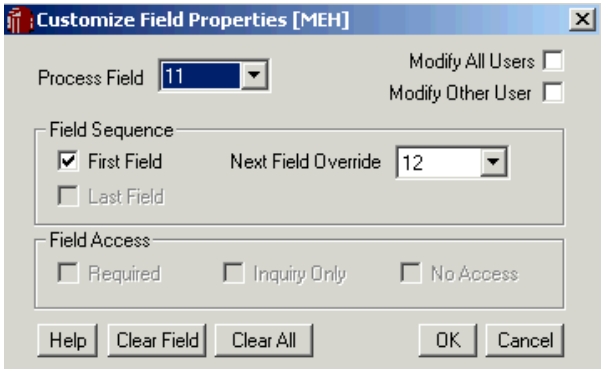
- Fields appearing in the screen's header block can only have No Access restrictions applied to them.
- When you apply a field access restriction (required, inquiry only, no access) to a field, you cannot apply any other field access restrictions.
- If a field is specified as required by Envision, you cannot modify any of the access options.
- If a field is specified as no access by Envision security, you cannot modify any of the access options.
- If a field is specified as inquiry-only by Envision, you only have the option to make the field no access.

Procedure for Customizing Fields on a Screen

You may not have access to all of the options provided in this procedure. The options that you are presented with correspond with the level of access granted to you by your system administrator. This procedure describes the process as if you have access to all of the customization options.

Step 1. Access the screen you wish to customize.

Step 2. From the Tools menu, select Customize Field Properties to display the Customize Field Properties dialog.



Step 3. Indicate if you want to modify the field properties for all users or a specific user:

- Selecting Modify All Users applies the customization to all users in the database.
- Selecting Modify Specific Users provides you with a dialog to enter the login ID of a specific user you would like to apply the customization to.
- Do nothing if you want to modify the field properties only for yourself.

Step 4. In the Process Field drop-down list, select the number of the field you want to modify.

Step 5. Indicate the field sequence you want to apply to the field.

- Select First Field if you want to indicate that the selected field is the first field in the tab sequence.
- Select Last Field if you want to indicate that the selected field is the last field in the tab sequence.
- Select the next field in the tab sequence from the Next Field Override list.

Step 6. Indicate the level of field access you want to apply to the selected field.

- Selecting Required prevents users from finishing from the screen without populating it.
- Selecting Inquiry Only allows users to only view the data; they cannot update or delete data.
- Selecting No Access prevents users from viewing, adding, changing or deleting data.

Step 7. Repeat steps 3-6 for each field you wish to customize.

Note: You do not need to click OK after customizing each field. You can click OK after making customizations to all of the fields on a screen to apply all of the customizations.

Clicking Clear Field removes customizations for the currently selected Process Field. All other customizations are left unchanged.

Clicking Clear All removes all customizations for the current form, for the user you are editing.

Step 8. Click OK.

Procedure for Disabling Field Sequence

After you set up custom field sequencing, you can indicate whether you want to activate the customizations by using the Enable/Disable Field Customization feature.

Step 1. Access the screen you customized.

Step 2. From the Tools menu:

Select Disable Custom Field Sequence to disable the custom field sequencing. A check displays next to this option when field sequencing is disabled.

Or, deselect Disable Custom Field Sequence to enable the custom field sequencing.

Note: When you disable custom field sequencing, it is disabled only for the current session. When you log out of the screen and return, field sequencing will be enabled again.

Procedure for Showing Field Sequence

You can optionally display the current field sequence of a screen. If you customized a field sequence, your customization displays. If you did not customize a field sequence, the default field sequence displays.

Step 1. Access the screen you customized.

Step 2. From the Tools menu:

Select Show Field Sequence to view the field sequence.

Or, deselect Show Field Sequence to view the screen without displaying the field sequence.

The Multi-Line Text Editor

User Interface 1.0 gives you the option to use either a single-line text editor or the multi-line text editor on the many Envision forms that let you edit text. This multi-line text editor lets you type text in a fixed area and automatically "wraps" the text when you come to the end of a line. This function lets you enter text without having to use a "hard carriage return" when you get to the end of line, similar to most desktop publishing software.

The multi-line text editor lets you select multiple lines of text or all lines of text and perform a "copy and paste." See "Copy and Paste Capability" on page 3-75

Note: There are some limitations that you and your system administrator need to consider before implementing the multi-line text editor. For a discussion on these limitations, see *User Interface 1.0 Installation Procedures* dated June 1, 2002 (or later).

Single-line Text Editor vs. Multi-line Text Editor

The fundamental difference between a single-line text editor and a multi-line text editor is the automatic "text wrapping" capability. With a single-line text editor, you must manually start another line when entering text. This can be cumbersome and annoying when you have a large amount of text to enter. An example of a single-line text editor form is shown in Figure 3-58 on page 3-71.

The multi-line text editor screen lets you enter free-form text in a Comments field, Description field, and so on, and type your text without entering hard returns. The text wraps automatically as you type. An example of the multi-line text editor is shown in Figure 3-59 on page 3-71.

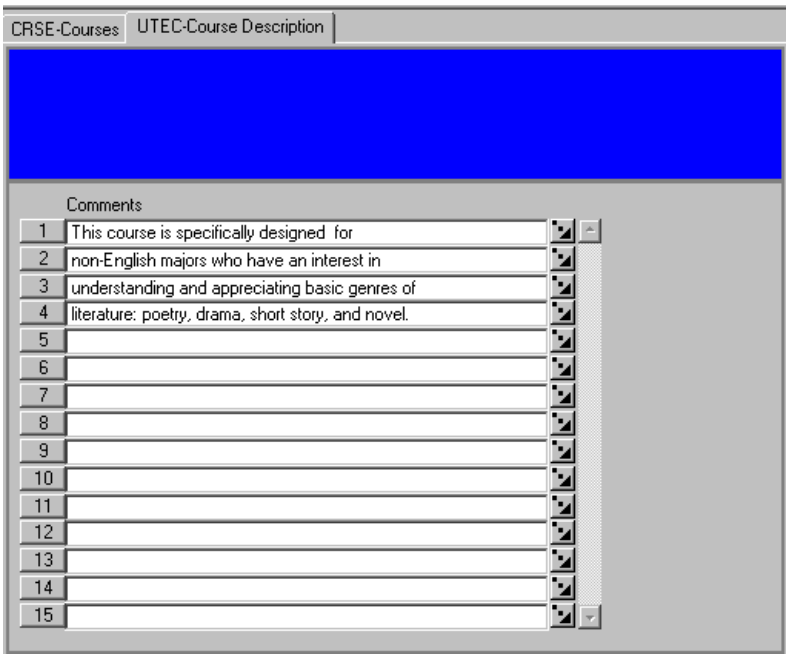


Figure 3-58: Example of a Single-line Text Editor Screen

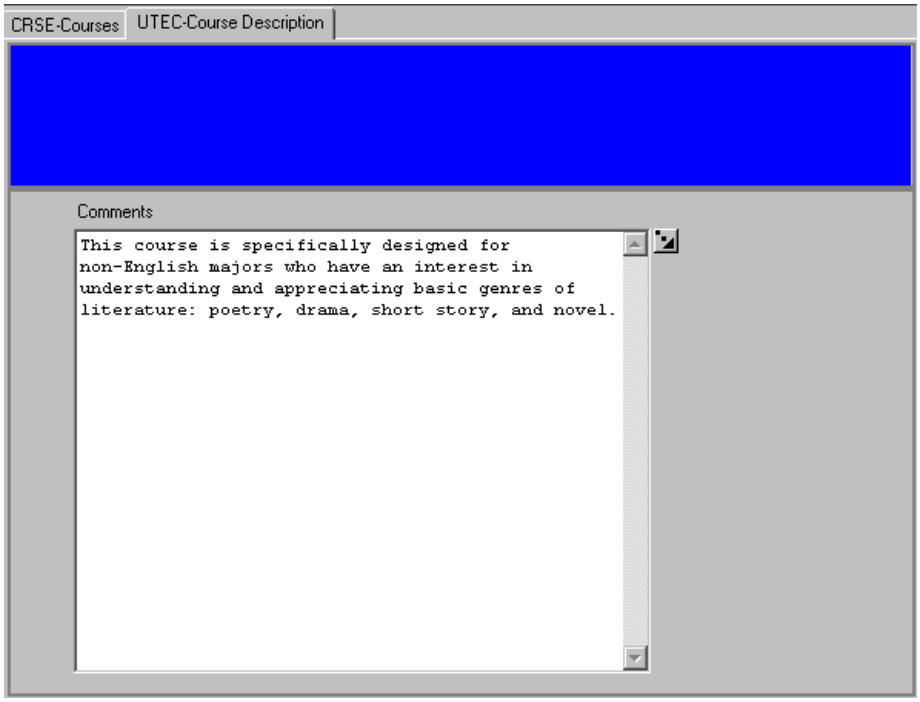


Figure 3-59: Example of the Multi-line Text Editor Form

When using the multi-line text editor, loading a large amount of text may take more time than a single-line editor. With a single-line text editor, the screen "loads" the text one screen, or fifteen lines, at a time. With the multi-line text editor, the entire block of text is loaded at once.

Using the Multi-line Text Editor

When you want to use the multi-line text editor to enter a block of text, detail on a field that has UTEDIT capability, such as a Comments field or Description field[3]. If there is existing text in the field from which you are detailing, and that text exceeds the text limits of the multi-line text editor, you will receive an alert message indicating the condition as shown in Figure 3-60.

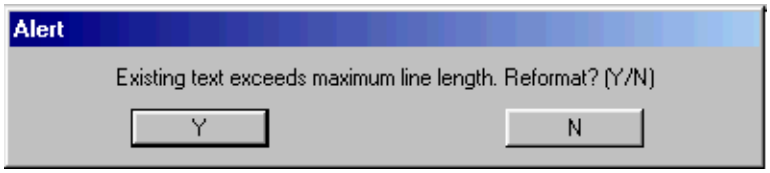


Figure 3-60: Text Exceeding Maximum Line Length Alert Message

If you select "Y" on the Alert dialog box, the text will wrap on the multi-line text editor screen. You can then edit the text as needed. (If you decide not to keep the modified text and want the original text, select Cancel.)

If you select "N" on the Alert dialog box, the text will wrap on the multi-line text editor screen, but you cannot edit the text. (The editor screen displays in inquiry-only mode when you select "N" on the Alert dialog box.)

Figure 3-61 shows an example of text that exceeds the maximum line length. In this particular field, you can "scroll" through the field to read the text. When you detail from the field, you'll receive the Alert dialog box.

3. Not all fields with UTEDIT capability will have the multi-line text editor feature. Some screens and fields are not coded to use the editor feature, but most are coded to take advantage of the multi-line text editor.

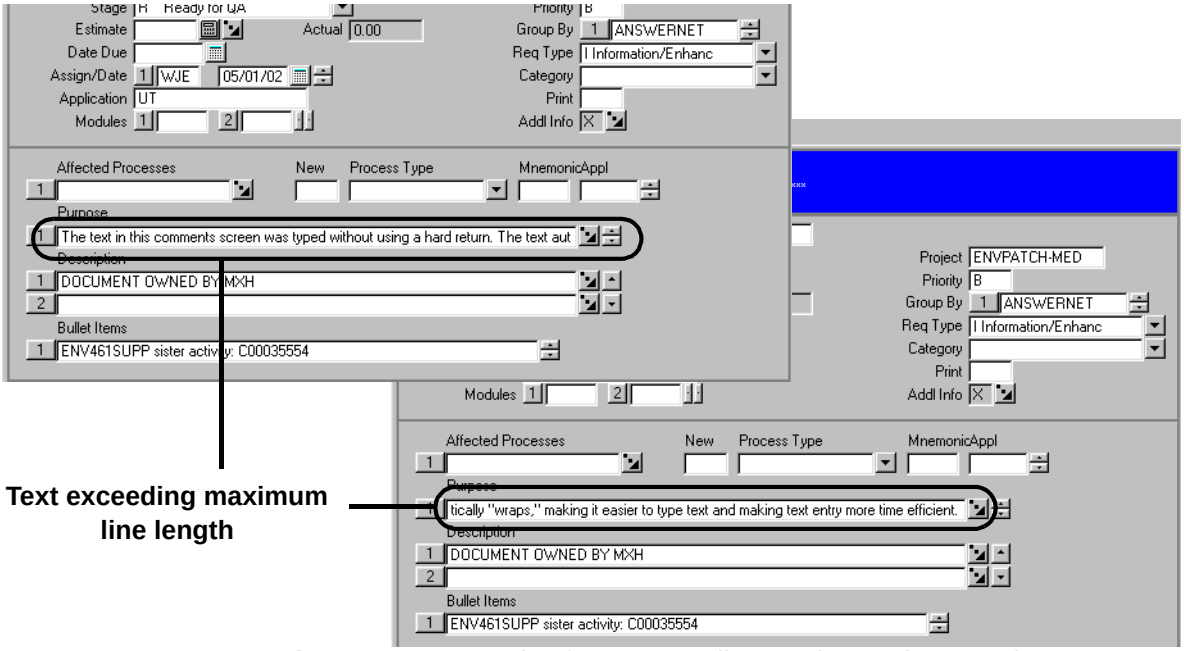


Figure 3-61: Example of Text Exceeding Maximum Line Length

If you use the multi-line text editor and want to keep text “as is,” select **N** from the Alert dialog box. Although the text will display wrapped on the text editor (in inquiry-only mode) as shown in Figure 3-62, the actual format will not be altered.

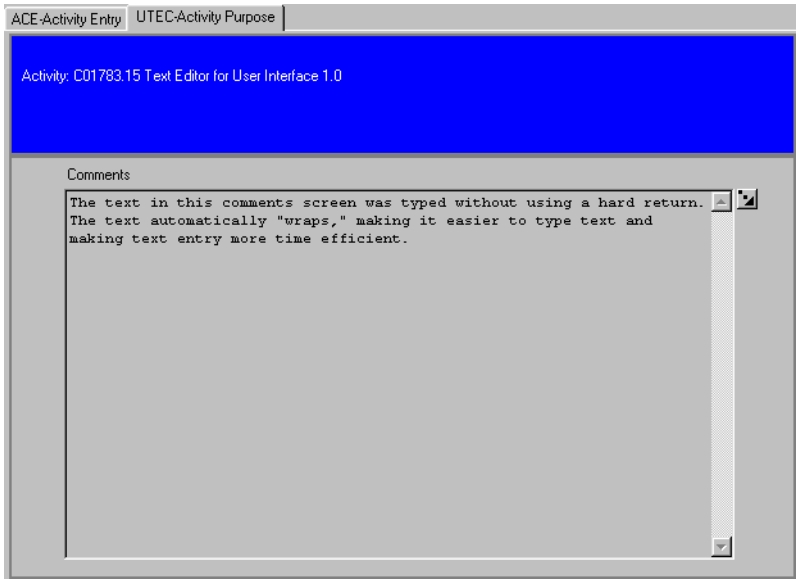


Figure 3-62: Multi-line Text Editor in Inquiry-only Mode

Although the text displays in “inquiry mode” in the multi-line text editor, you can still use a line editor (if you have access) to modify the text. (The text is inquiry-only on the multi-line text editor.) To use a line editor, detail from the multi-line text editor to access your line editor of choice. An example is shown in Figure 3-63 on page 3-74.

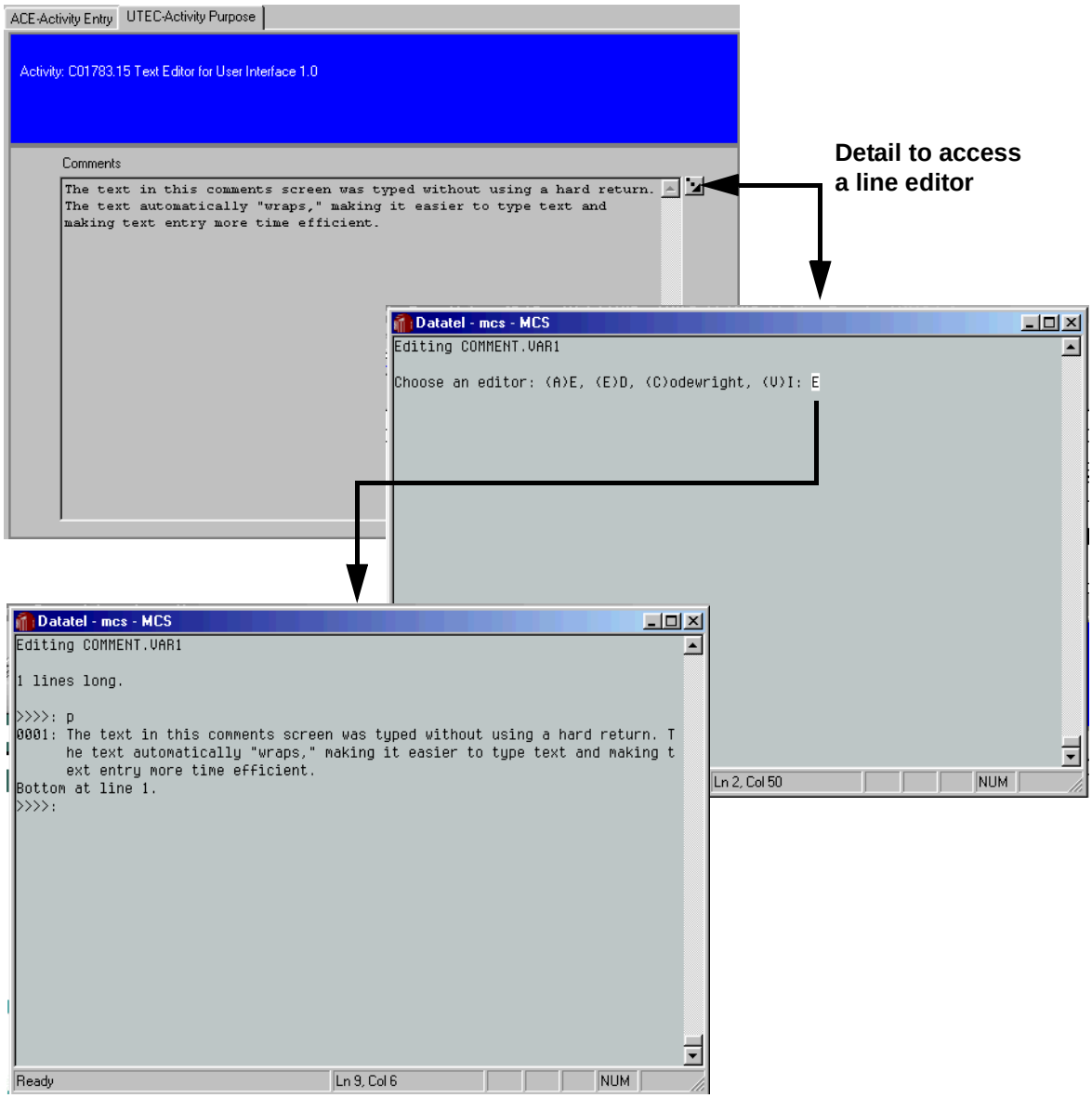


Figure 3-63: Example of Detailing from the Multi-line Text Editor in Inquiry-only Mode

However, if you select “Y” on the Alert dialog box, the text will reformat in the text editor. You can make any changes, but if you save the information (that is, if you do not cancel), the text will retain the new format. An example of the multi-line text editor in edit mode is shown in Figure 3-64.

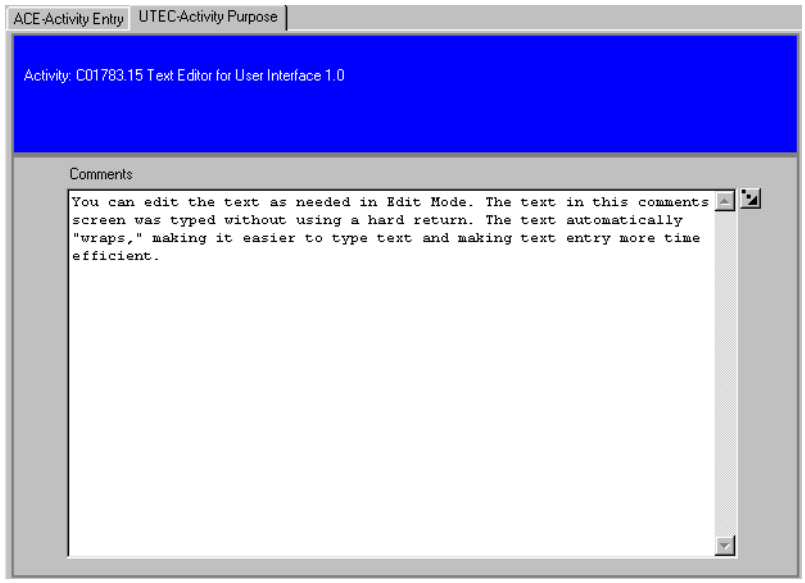


Figure 3-64: Multi-line Text Editor in Edit Mode

Note: When the text is wrapped, each line of the text is placed in its own line with in the record. In the example above, the one, long line of text is wrapped, so the one line is split into four separate lines within the record after reformatting.

Copy and Paste Capability

The multi-line text editor lets you copy text from a source document and paste the text into the multi-line text editor. For example, you may have text from an e-mail or other document that you want to copy into a Comments field or a Description field. You can use standard copy and paste procedures between a source document and the multi-line text editor.

Note: The multi-line text editor does not support graphics, so you cannot cut and paste any graphic images into the editor. However, you can copy text from the multi-line text editor when in inquiry-only mode.

Loading Existing Records

If you want to load an existing record into the multi-line text editor, you can detail from the multi-line text editor (in edit mode or in inquiry-only mode) to a line editor, then perform that editor's standard load command. An example is shown in Figure 3-65 on page 3-76.

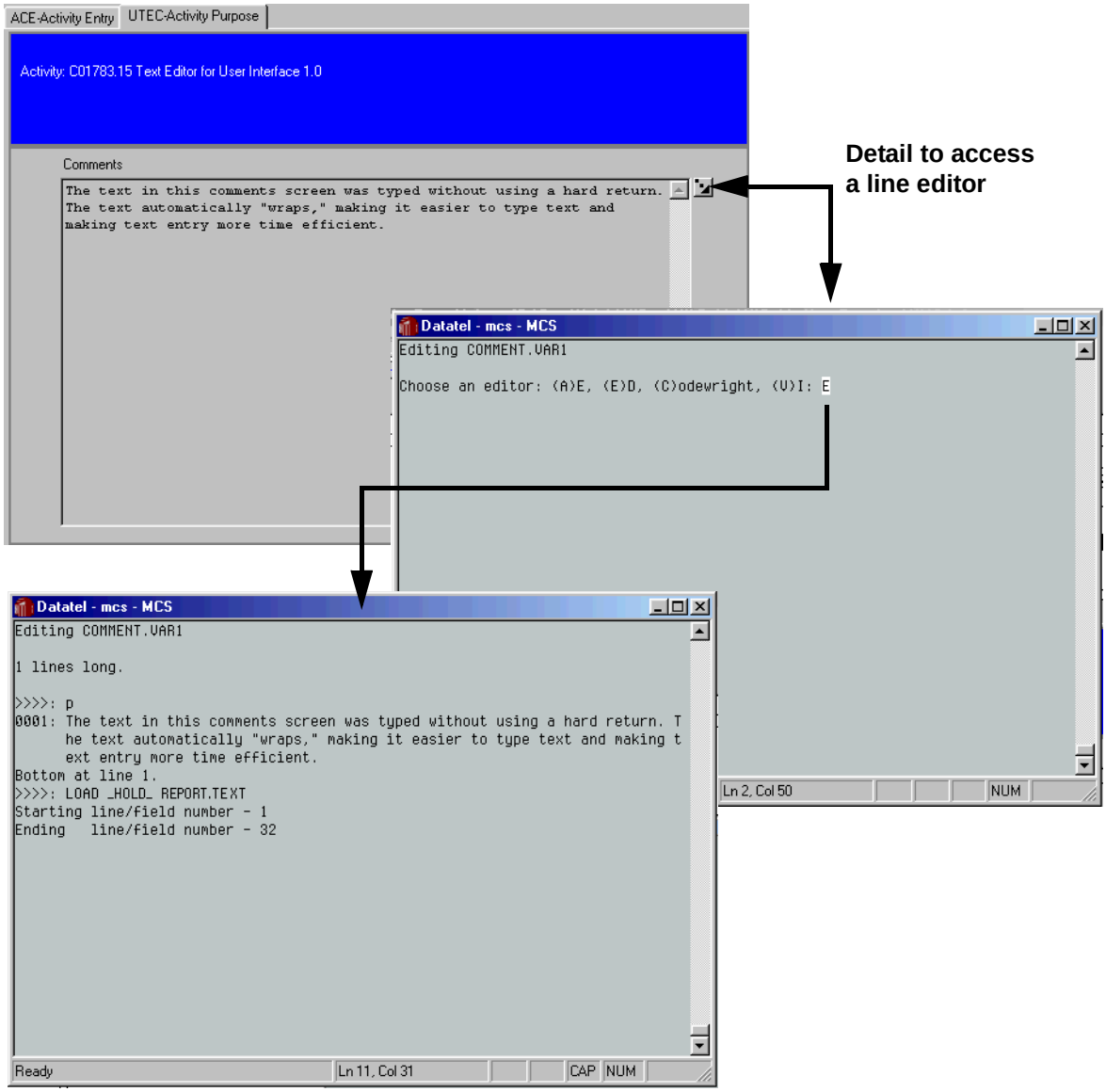


Figure 3-65: Example of Detailing from the Multi-line Text Editor to a Line Editor

If the text you load exceeds the length of the maximum line length, you will receive the Alert message (as shown in Figure 3-60 on page 3-72). Select **Y** to reformat the loaded text. Select **N** to retain the loaded text's format.

Date and Time Stamp Feature

With the single-line text editor, you can use the pound key's symbol (#) to date and time stamp your text. Although the multi-line text editor does support the # key as your date and time stamp your text, you can use the Date/Time/Login option from the Edit menu as shown in Figure 3-66.

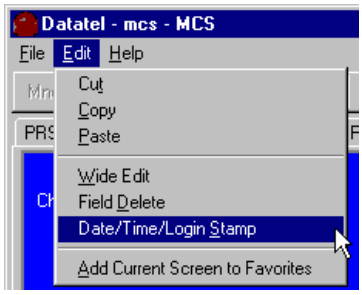


Figure 3-66: Example of the Date/Time/Login Option

Note: You can use the Date/Time/Login option on many fields, not just Comment fields and Description fields.

Technical Tip: You can also use the keyboard shortcut ***Alt+E S*** to access the Date/Time/Login option. (That is, press and hold the ***Alt*** key, then press the ***E*** key, release the keys, then press the ***S*** key.)

Setting the Font for the Multi-line Text Editor

The font for the multi-line text editor is the same font set for a resolution screen. See "Defining Your Preferences" on page 3-52 for information about setting fonts.