

Guide to User Interfaces

Reissued Manual as of May 24, 2006

Enclosed is a new edition of the manual *Guide to User Interfaces* for Envision 4.7/4.8 Colleague® 17/18 Benefactor™ 5.1. This edition replaces your existing manual.

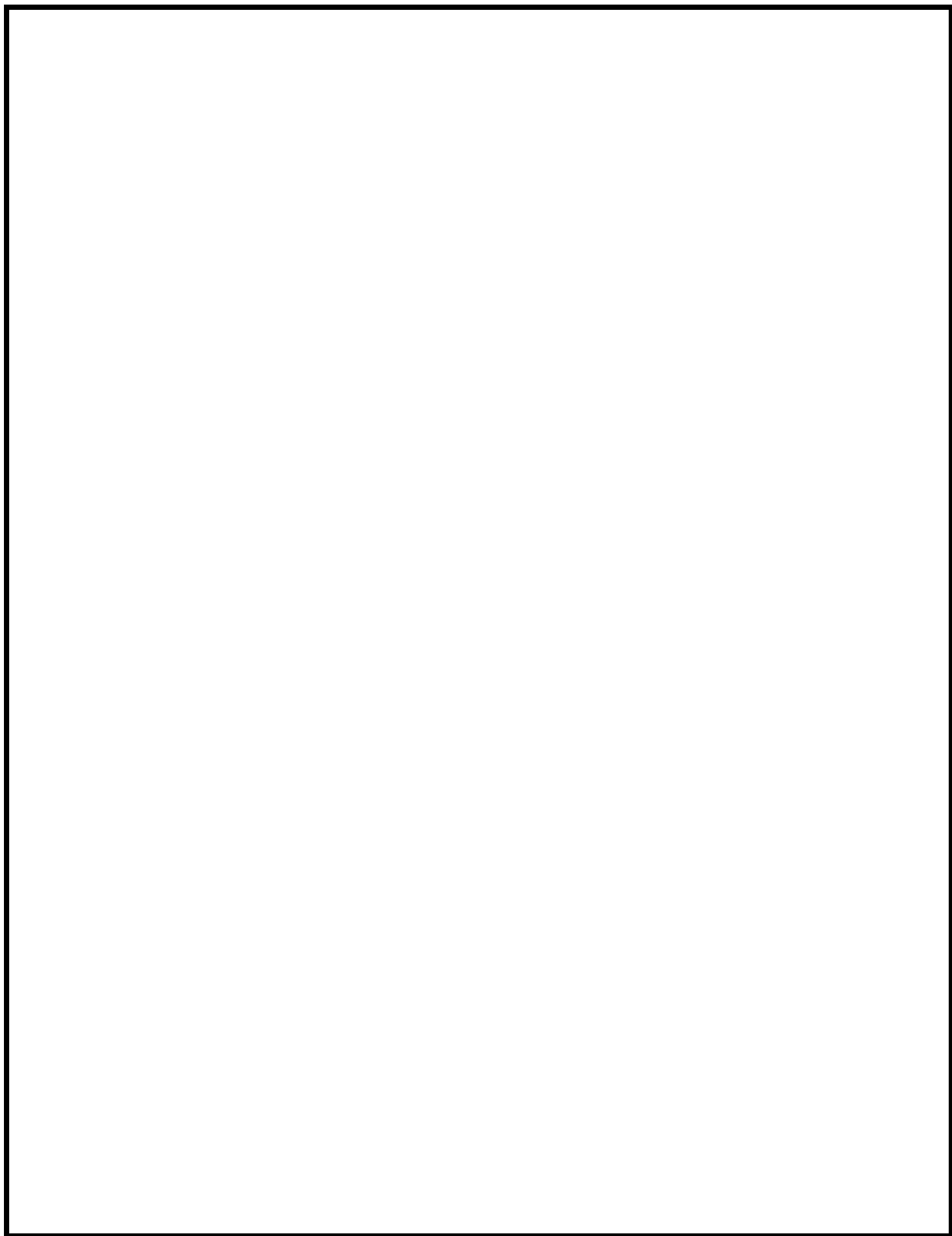
The Primary Changes Made

- The grouping of the save, cancel, save all, and cancel all buttons in UI have changed. The screen captures in the manual have been updated to reflect this change.
- You now can go to a specific page in the report browser by entering the page number in the page number field. “Browsing Reports” beginning on page 1-52 has been updated to reflect this enhancement.

Chapters contained in the manual may only pertain to certain release levels are so noted in that chapter.

Updating Your Manual

Replace *all copies* of your existing manual with this new edition as it will be the basis for all future updates.



Envision®

Guide to User Interfaces

**Envision 4.7/4.8
Colleague® 17/18
Benefactor™ 5.1**

**User Interface Web 2.0
User Interface Desktop 1.5**

May 24, 2006

For last-minute updates and additional information about this manual,
see AnswerNet page 1926.37.

Guide to User Interfaces

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Tracking the History of Revisions

The contents list shows only the date of the latest revision of each section; it does not show a history of previous revisions or the reasons for revisions. Each update to this manual includes a memo describing the reasons for the update. If you want to track the history of revisions and the reasons for revisions, keep the update memos with your copy of this manual.

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Guide to User Interfaces

1. UI Desktop and UI Web

Logging In


In This Chapter

This chapter helps you learn how to access User Interface (UI) Desktop and UI Web with Benefactor or Colleague. It includes instructions for logging into UI Desktop and UI Web.

Procedure for Logging Into UI Desktop

Complete the following steps to log into UI Desktop.

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

- Double-click the desktop icon .
- From the Windows Start menu, select **Programs|Datatel|Datatel**.

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

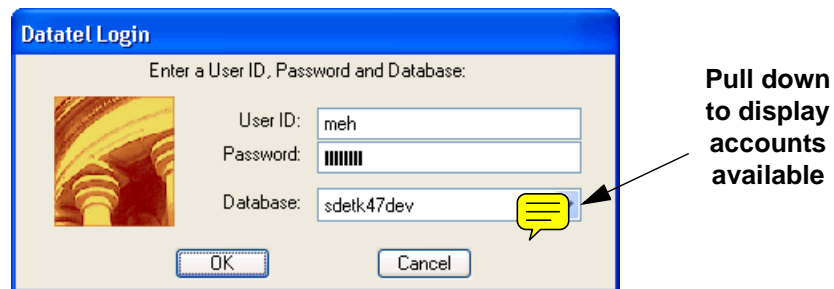


Figure 1-1: User Interface Desktop Login Dialog Box

Step 2. Enter your user ID, password, and database.

Step 3. Click **OK**.

A message box appears, informing you that UI is loading the application files. When the files are loaded, the UI Desktop window is displayed, as shown in Figure 1-4 on page 1-7.



Technical Tip:

After logging into a UI session (**UI Desktop only**), you may wish to bring up a second session for the same database account. You can do so quickly, and without having to log in again by selecting the **New Session|Current Account** option from the File menu of any form. You can also select the **New Session|New Account** option to log into a different account.

Procedure for Logging Into UI Web

Complete the following steps to log into UI Web:

Step 1. Access the Login dialog box.

The Login dialog box is displayed, as shown in Figure 1-2.

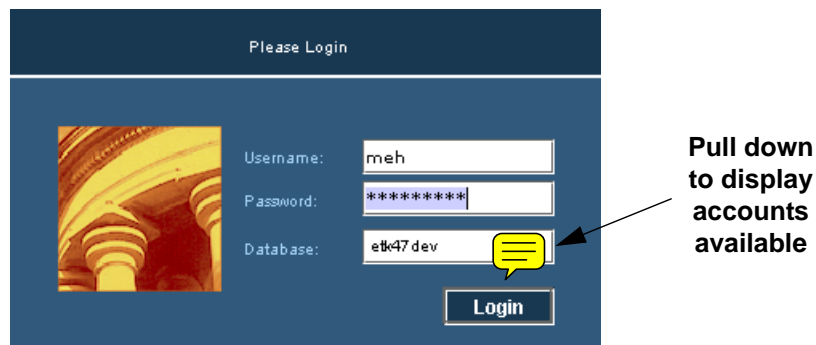


Figure 1-2: UI Web Login Dialog Box

Step 2. Enter your user name, password, and the database you want to access.



Note: The Database field is dependent on the User ID you enter. The Database field is not enabled until you enter a User ID.

Step 3. Click **Login**.

You are prompted with a security dialog, which asks if you want to trust IBM's signed applet (see Figure 1-3).



Figure 1-3: UI Web Security Warning Dialog

You can select one of the following:

- **Always.** Datatel recommends selecting this option, so you will not see the security dialog again.
- **No.** Datatel recommends not selecting this option, as this is sometimes difficult to reverse, and it may prevent you from being able to run the applet from your browser.
- **Yes.** Selecting Yes causes the security warning dialog to be issued each time you open the link, (until you select Always or No).

The UI Web window is displayed, as shown in Figure 1-9 on page 1-12.

Navigation

In This Chapter

This chapter helps you learn how to use UI with Benefactor or Colleague. It includes instructions for accomplishing various tasks, such as accessing a form, saving your work, and using online help.

UI Desktop and UI Web provide you with almost identical functionality. However, the look, feel, and location of many menus and buttons are slightly different. See the sections, “The UI Desktop Window” on page 1-6 and “The UI Web Window” on page 1-11 for detailed information about the differences between UI Desktop and UI Web. The remaining sections of this manual refer to UI Desktop and UI Web collectively.

Features of UI include:



- Tabbed multiple forms managed within the window.
- A Detail button next to every field that allows detail.
- 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 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.

The UI Desktop Window

The UI Desktop window, shown in Figure 1-4 on page 1-7, contains all the processes you use while working with Benefactor or Colleague as shown through the UI Desktop interface. The following sections describe the functional areas of the window. The window includes several components, such as the title bar, menu bar, address bar, toolbar, and any Datatel forms that are currently open.



Note: UI Web provides you with the same functionality as UI Desktop. However, the look, feel and location of many menus and buttons are slightly different. Refer to “The UI Web Window” on page 1-11 for information about the User Interface Web window.

- Step 1.** If necessary, select the application with which you want to work from the **Apps** menu at the top of the window. The left pane of the window displays the folders and processes available for the selected application in an expandable tree format.
- Step 2.** Click the Plus sign  next to any folder icon in the left pane to expand the folder. When a folder is expanded, you can click the Minus sign  next to its icon to collapse it.
- Step 3.** Double-click a folder icon to expand the folder. Double-click a form icon to open the form.

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

Procedure for Navigating the UI Desktop Window

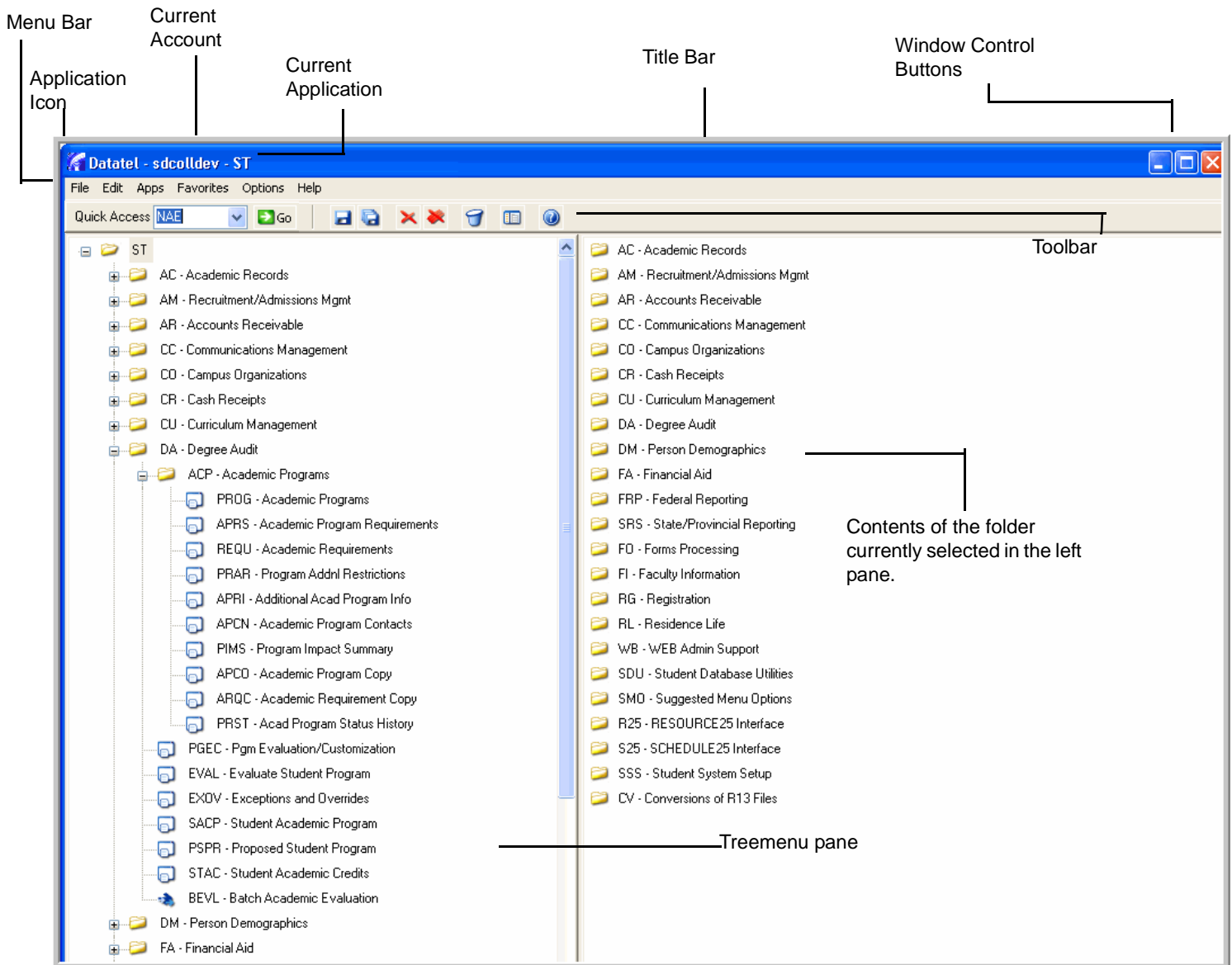


Figure 1-4: User Interface Desktop Window

Parts of the UI Desktop Window

Title Bar

The title bar, shown in Figure 1-5, tells you which Colleague or Benefactor database you are accessing and which application you are currently running. The title bar is highlighted when the window is the active window.

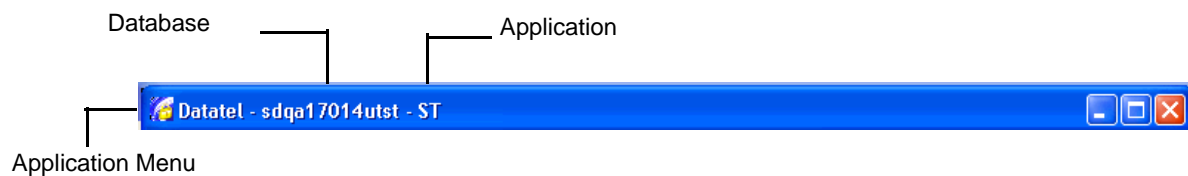



Figure 1-5: UI Desktop Title Bar

Application Icon

Click the application icon  to access the application icon options: Restore, Move, Size, Minimize, Maximize, or Close. Depending on the current state of the window, some options may not be available. To close the window 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 1-6, enables you to do the following:

- 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.

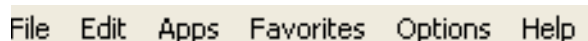


Figure 1-6: UI Desktop Menu Bar

Toolbar

The toolbar, shown in Figure 1-7, provides easy access to common functions, such as saving your work, canceling changes, deleting records, and accessing online help.

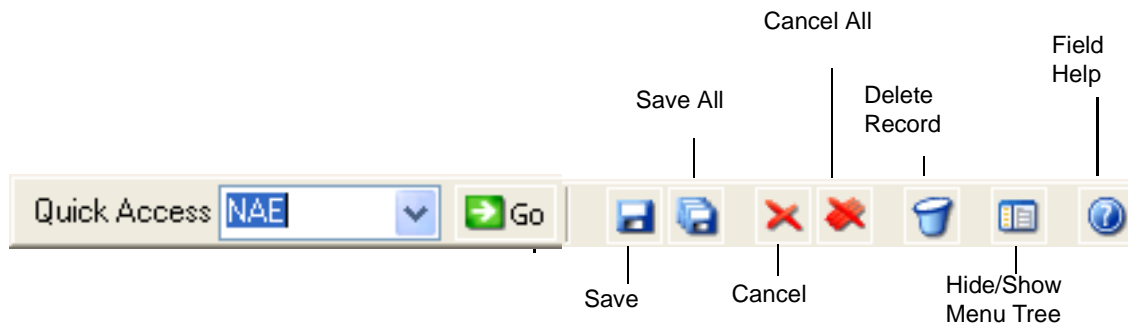




Figure 1-7: UI Desktop Toolbar

Quick Access

The Quick Access field enables you to access any form directly by entering its mnemonic, or by using the drop-down menu button  to select a recently used mnemonic. Press **ENTER** or click **Go**  to display the selected form.

Record Delete

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

Save and Cancel

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 form that is currently open in this session. The **Save** and **Cancel** buttons enable you to save or cancel changes to the current form.

Hide/Show Menu Tree

While a form is open, you can allocate more viewing space to it by clicking the **Hide/Show Treemenu** button. The left treemenu pane closes, and the form occupies the entire window. Click the **Hide/Show Treemenu** button again to toggle this option off and display the treemenu in the left pane.

Window Control Buttons

The Window Control buttons, shown in Figure 1-8, enable you to minimize, maximize, or close the window.

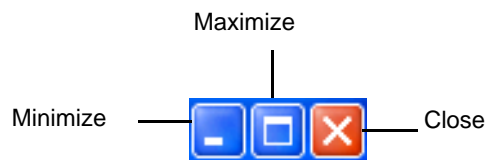


Figure 1-8: UI Desktop Window Control Buttons

When the window is maximized, the Maximize button is replaced by the Restore button in the Window Control.



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

The UI Web Window



The UI Web window, shown in Figure 1-9 on page 1-12, contains all the processes you use while working with Benefactor or Colleague, as shown through the UI Web interface. The following sections describe the functional areas of the window. The window includes several components, such as the title bar, menu bar, address bar, toolbar, and any Datatel forms that are currently open.

Procedure for Navigating the UI Web Window

- Step 1.** If necessary, select the application which you want to work from the **Apps** menu at the top of the window. The window displays the folders and processes available for the selected application in an expandable tree format.



Note: UI Web displays the window in a single pane, as opposed to the UI Desktop double pane.

- Step 2.** Click the Expand tree node  next to any folder icon to expand the folder. When a folder is expanded, you can click the Collapse tree node  next to its icon to collapse it.

- Step 3.** Double-click a form icon to open the form.

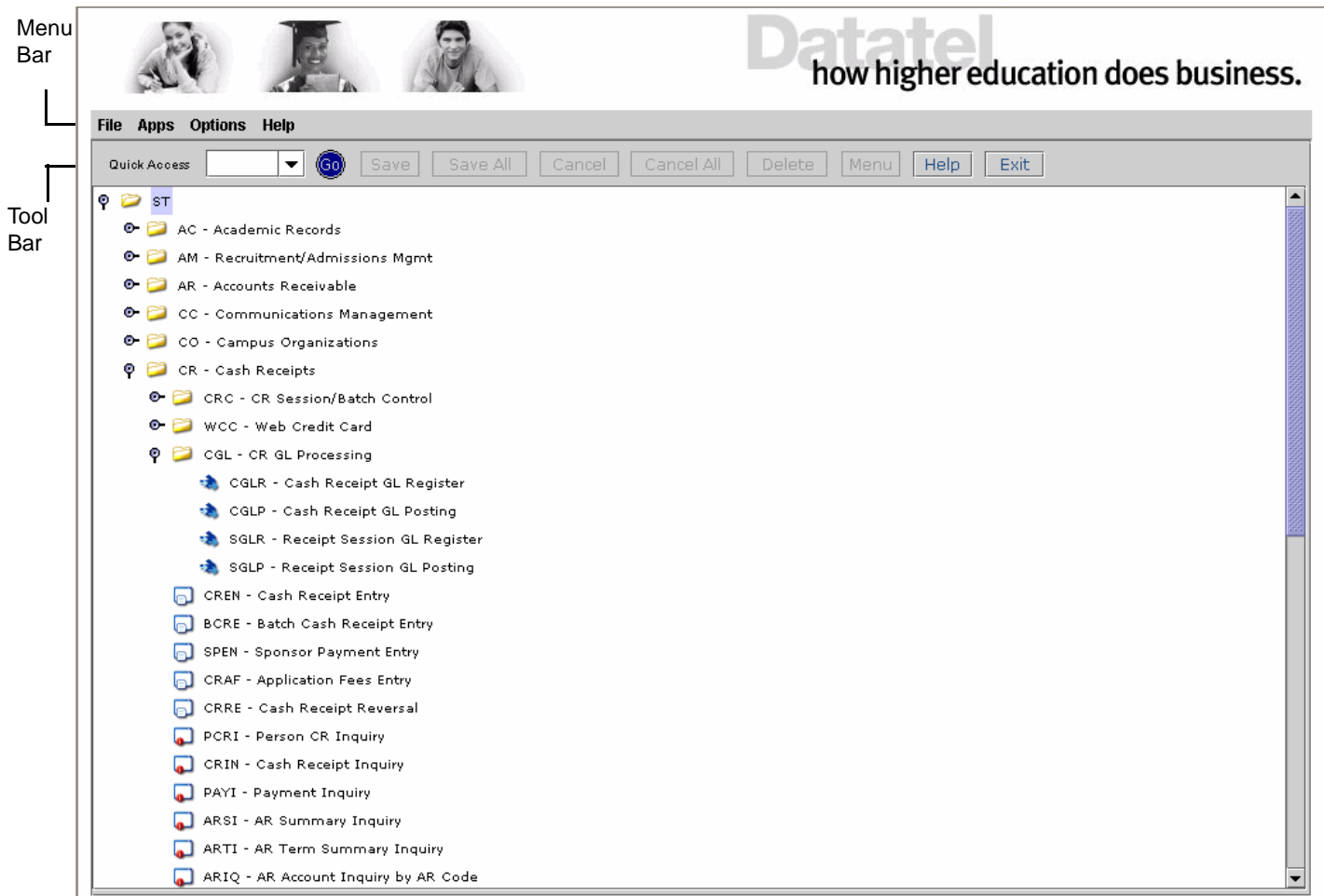


Figure 1-9: UI Web Window

Parts of the UI Web Window

Menu Bar

The menu bar, shown in Figure 1-10, enables you to do the following:

- 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.
- Create a list of favorite forms.
- Define your preferences for how forms are displayed.
- Access online help.



Figure 1-10: UI Web Menu Bar

Toolbar

The toolbar, shown in Figure 1-11, provides easy access to common functions, such as saving your work, canceling changes, deleting records, and accessing online help.



Figure 1-11: UI Web Toolbar

Quick Access

The Quick Access field 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 **Go** to display the selected form.

Save and Cancel

The **Save** and **Cancel** buttons enable you to save or cancel changes to the current form. 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 form that is currently open in this session.

Record Delete

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

Menu

While a form is open, you can allocate more viewing space to it by clicking **Menu**. The left treemenu pane closes, and the form occupies the entire window. Click **Menu** again to toggle this option off and display the treemenu in the left pane.

Help

Click **Help** to view online help.

Exit

Exit UI.

Envision Forms in UI

Most of your work in Colleague and Benefactor is done through Envision 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.

When you select a form, it appears in the right pane of the window, as shown in Figure 1-12, with its name and mnemonic displayed on a tab. You can choose to have the left pane of the window remain visible (default condition), or to hide it in order to allocate more space to the form.

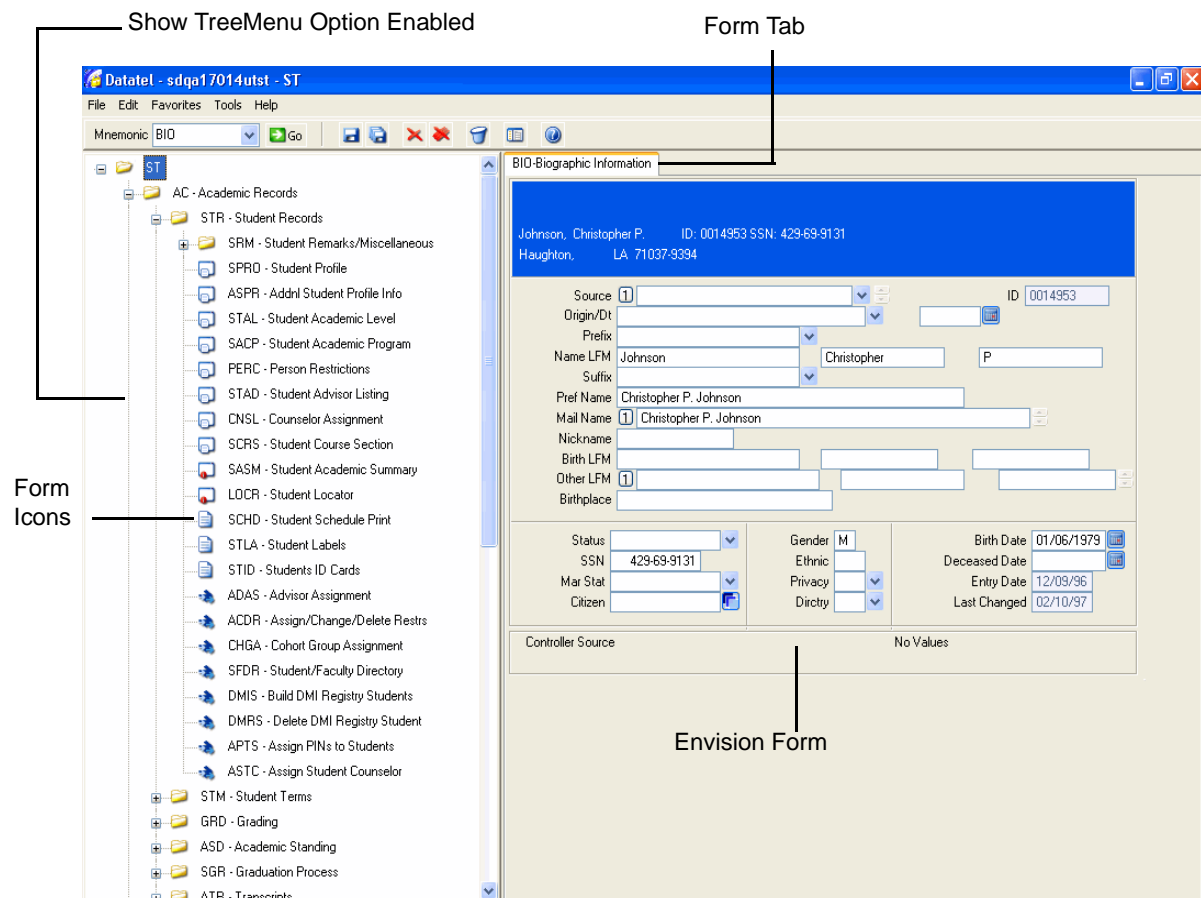


Figure 1-12: Sample Form in UI Desktop Window

Types of Forms

Menus and submenus are represented by form icons, while forms are represented by four different icons according to functionality. The folder icons are described in Table 1-1.





Icon	Name	Description of Datatel Form Icons
	Maintenance	Allows 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 treemenu.
	Processing	Allows 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	Allows you to view information without changing it; for example, the history of a general ledger account. Strictly speaking, inquiry forms are forms that are <i>designed</i> 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	Allows 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. See "Browsing Reports" beginning on page 1-52 for information about the Report Browser.

Table 1-1: Description of Datatel Form Icons

Accessing Forms

You can access a form in several ways:

- TreeMenu
- Quick Access
- List of Favorites
- Envision Run Dialog Box

Accessing Forms From the TreeMenu

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 window menu form is displayed. The left treemenu is the main navigational menu.

Use the treemenu to navigate through the folders. When 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 treemenu, double-click it.

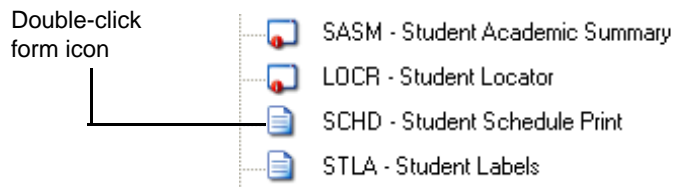


Figure 1-13: Icons on the Treemenu

Accessing Forms From the Quick Access Field

Enter a form mnemonic in the Quick Access field, or use the drop-down list to select a previously used form mnemonic.

Press **ENTER** or click **Go** to display the form.

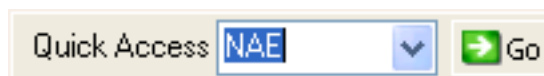


Figure 1-14: Quick Access Field

Accessing Forms From the List of Favorites

Use the **Favorites** menu to select a form that has been previously added to your list of favorites, as shown in Figure 1-15. See “Defining Favorites” beginning on page 1-71 for information about creating a 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.

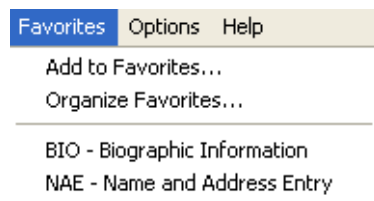


Figure 1-15: List of Favorites

Accessing Forms From the Envision Run Dialog Box

Choose **Run** from the **File** menu. The Envision Run Dialog box appears, as shown in Figure 1-16. Enter the mnemonic of the form you want, and click **OK**.

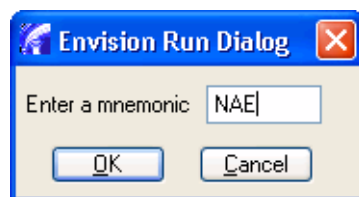


Figure 1-16: Envision Run Dialog Box



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

The details of the sample form are shown in Figure 1-17.

The diagram shows a sample form titled "BIO-Biographic Information". The form is divided into a "Header Block" and a "Data Area". The "Header Block" contains the text "Johnson, Christopher P. ID: 0014953 SSN: 429-69-9131" and "Haughton, LA 71037-9394". The "Data Area" contains various input fields and dropdown menus for personal information, including Source, Origin/Dt, Prefix, Name LFM, Suffix, Pref Name, Mail Name, Nickname, Birth LFM, Other LFM, Birthplace, Status, SSN, Mar Stat, Citizen, Gender, Ethnic, Privacy, Dirctry, Birth Date, Deceased Date, Entry Date, and Last Changed. The form also includes a "Controller Source" field and a "No Values" label.

Figure 1-17: Sample Form Detail



Note: While a form is open, you can allocate more viewing space to it by clicking **Hide/Show Treemenu**. The left treemenu pane closes, and the form occupies the entire window. Click **Hide/Show Treemenu** again to toggle this option off and display the treemenu in the left pane.

Parts of a Form

Form Tab

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

Form Mnemonic and Name

A mnemonic provides you with a quick way to access a form.

Header Block

The header block displays data that identifies the record with which you are working. For example, the header block in Figure 1-17 on page 1-19 displays a student's name and ID.

Data Area

The contents of the data area differ depending on the form on 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 be restricted by Benefactor or Colleague. For example, you can 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 List Button” beginning on page 1-27 for information about selecting codes for validated fields.

Table

A table is a set of related fields. Each field in a table can have multiple values. Furthermore, there are usually several fields in a table 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 tables 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 1-18 is a row-oriented group. You read each set of fields across a row.

REL-Relation Information

Douglas, Ms. Maria ID: 0000675 SSN: 118-29-3746 Friend
Alexandria, VA 22305 Home: 703-273-8990

Spouse ID	Spouse Name	Birth Last Name	Source
<input type="text" value="0000001"/>	<input type="text" value="Mr. Kenneth J. Slavin"/>	<input type="text"/>	<input type="text"/>

Child ID	Child Name	Gen	Birthday	Source	Class
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="3"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Parent ID	Parent Name	--Relation--	Source	Class
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other ID	Other Relation Name	--Relation--	Source	Class
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="3"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Table

Element

Row

Figure 1-18: Example of a Row-Oriented Group

Form Control Buttons

UI offers several control buttons that assist you in viewing and editing data, as shown in Figure 1-19.

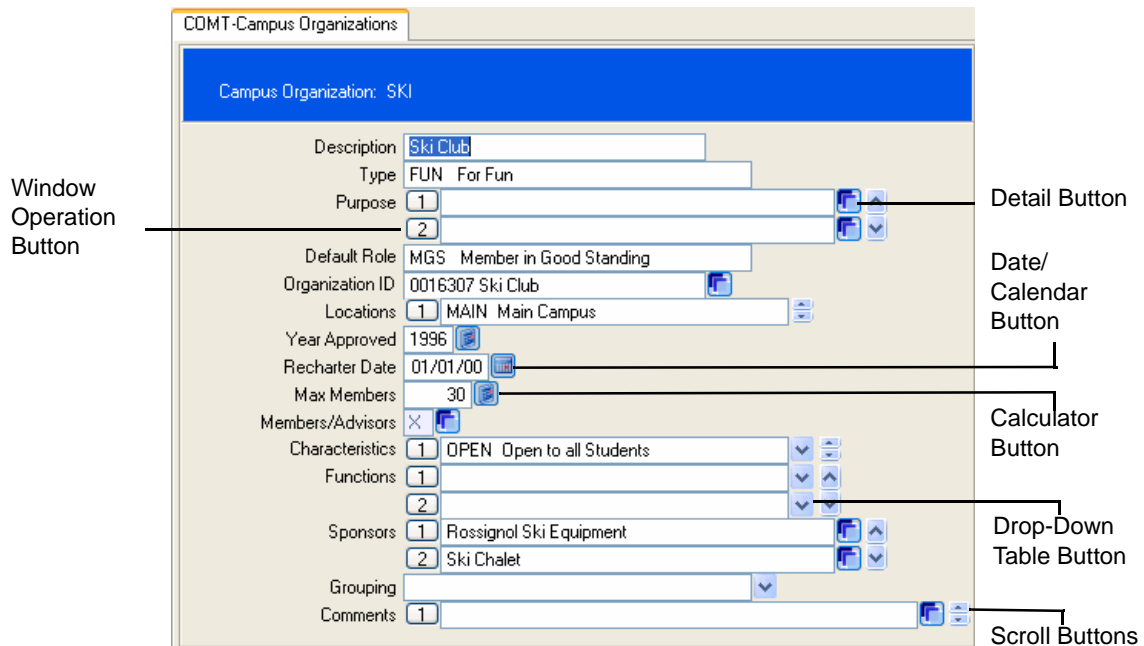



Figure 1-19: Form Control Buttons

Detail Button

Some forms give you only 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 1-20, the Student Profile (SPRO) form contains the Academic Program field. The Academic Program field provides only a code that indicates the name of 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.

SPRO-Student Profile

Hancock, Beth ID: 0000356 SSN: 898-76-7656
Fairfax, VA 22033

Preferred Mailing Address
76 Handsville Road
Fairfax VA 22033

Preferred Residence
76 Handsville Road
Fairfax VA 22033

Change Address

Academic Program	Cust Pgm	Acad Level	Status	Status Date	Ant Cmpl Date	Admit Status
1 UG.UNDEC	No	UG	Graduate	04/09/98		

Student Types/Date 1

Home Local SPRO-Student Profile SACP-Student Academic Program

Advis Restrict Directory/Priv Transcr

SACP-Student Academic Program

Hancock, Beth ID: 0000356 SSN: 898-76-7656
Fairfax, VA 22033
Acad Program: UG.UNDEC UG.UNDEC

Academic Lvl UG Class Lvl Acad Lvl Standing 04/09/98 WMK

Status/Dt/Opr 6

Location/Catalog BLSTN Ballston Campus 1996 Catalog for 1996/97

Admit Status

Dept/Div/School GENL Orientation

Acad Standing/Dt 1

Start/End Dt 02/20/97 05/31/98 Ant Cmpl Dt MM/YY 02/01

Degree AA Assoc Of Arts

CCDs 1 2

Majors 1 GENL General Studies 2

Minors 1 2

Specializations 1 2

Program Additions
DA Eval/Cust

Advisors
Counselors

Printed Comments
Comments

Figure 1-20: SPRO Form Detailed to SACP Form


Although the usual workflow is to access a detail form from another form, some detail forms are also available from the treemenu. Others, even though they are not listed on a menu, may still be accessed directly. Detail forms that can be accessed only via another form are referred to as *detail-only* forms. If you try to access a detail-only form directly, a message is displayed telling you that you cannot do so.

You will know a detail form is available from a field if there is a Detail button to the right of the field. Such fields are referred to as *detail fields*.



Note: The tab farthest 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.

Window Operation Button

A Window Operation button  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 1-21.

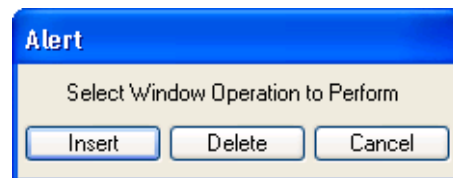


Figure 1-21: Select Window Operation Dialog Box

- 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 Button

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 1-22.

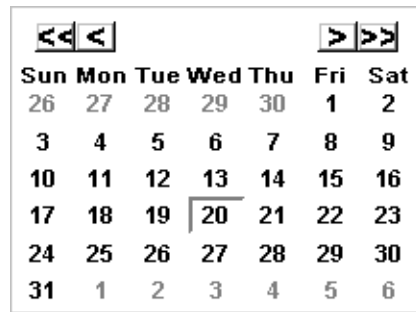







Figure 1-22: Calendar Browser

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 1-23.

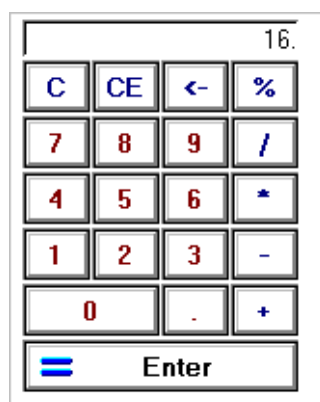

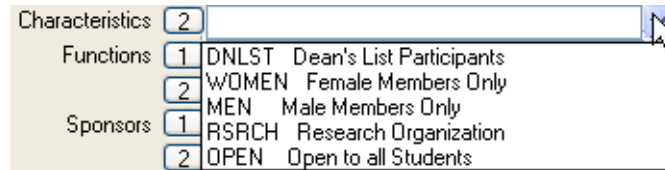


Figure 1-23: Calculator Feature

Drop-Down List 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 List button to display a list of valid codes, as shown in Figure 1-24.



Characteristics	2	
Functions	1	DNLST Dean's List Participants
	2	WOMEN Female Members Only
		MEN Male Members Only
Sponsors	1	RSRCH Research Organization
	2	OPEN Open to all Students

Figure 1-24: Validation Code Table

Click the appropriate code to select it.

Finding a Record

Most maintenance forms require you to select a specific record to view or maintain. For example, to change a person's address, you must first specify which person you want to see.

You specify the record to work with by responding to the LookUp prompt that is displayed after you access a form. LookUp prompts are labeled according to the type of LookUp you are performing.

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 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 want 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 1-25.

The screenshot shows a form titled "NAE-Name and Address Entry" for Hancock, Mr. Figaro. The form contains various fields for personal and address information. A red box highlights the "Name LFM" field with the value "Hancock". A blue box highlights the "Ethnic/Gender" field. A line points from the "Ethnic Group LookUp" label to the "Ethnic/Gender" field. Another line points from the "Field Validated Against Another File" label to the "Ethnic/Gender" field. The "LookUp Indicator" label points to the "Ethnic Group LookUp" text at the bottom of the form.

Field Validated Against Another File

LookUp Indicator

Ethnic Group LookUp

Figure 1-25: Example LookUp Indicator for a Field

Using LookUp to Find Records

If you know the ID, or key, for the record you need, you can simply enter it at the LookUp prompt. For example, Beth Hancock's ID number is 0356. As shown in Figure 1-26, if you enter **0356** at the Person LookUp prompt for the Name and Address Maintenance (NAE) form, information about Ms. Hancock is displayed.

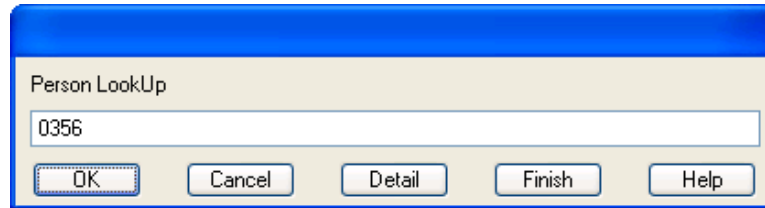


Figure 1-26: Basic LookUp

When you do not know the record ID, LookUp provides a number of options that help you find the record using the information you do have. For example, if you do not know Ms. Hancock's ID number, you can enter her last name at the Person LookUp prompt. If you enter "hancock" at the Person LookUp prompt for the Name and Address Maintenance form, a resolution form displays a list of all the people in your database whose names begin with "Hancock."¹ You can then select Beth Hancock from this list. See "Finding Multiple Records" beginning on page 1-30 for more information about finding multiple records.

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

Finding Multiple Records

When you want to review or work with a set of records on a given form, you can select multiple records directly from a resolution form, as shown in Figure 1-27.

NAE-Name and Address Entry | NAE-Name and Address Entry

PERSON Lookup Screen

using PERSON, View: Combined

Seq: Name	Address	SSN
ID, Status (Reunion Class)		Entry Date
Source (Birth Name)	Where Used	Birth Date
<input type="checkbox"/>		
<input checked="" type="checkbox"/> 5: Johnson, Bruce N	345 Quail Dr	433-41-2335
0013946	Merritt Island, FL 32953-4678	12/09/96
	STA	04/10/79
<input type="checkbox"/> 6: Johnson, Christopher P	3408 Pinehaven Cir	429-69-9131
0014953	Haughton, LA 71037-9394	12/09/96
	PER	01/06/79
<input checked="" type="checkbox"/> 7: Johnson, Cindy P	1 Main St	169-22-3333
0000754	Cherry Hill, NJ 08003	08/02/94
	APP,MAI	
<input type="checkbox"/> 8: Johnson, Dan		
0024283		09/11/03
	PER	

Controller LookUp Resolution

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Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:

Figure 1-27: Resolution Form

You can select a group of records in any of the following ways:

- Click the box to the left of the Seq: Name heading, or enter **FA** (Flag All) in the Controller LookUp Resolution box to select all records in the list.
- Click the box to the left of each desired record.
- Use the keyboard to enter **F(lag)** in the Controller LookUp Resolution box, followed by each sequence number of the record you want to select. Each selected record is highlighted when you press **ENTER**.

When you have selected all the records you want, click the Save button at the bottom of the resolution form. UI 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. UI Desktop shows which record is currently displayed at the bottom of the form, as shown in Figure 1-28.

NAE-Name and Address Entry

Hancock, Mr. Figaro ID: 1103068 Age: 43
Home: 703 Birth: 01/12/1961

Prefix Mr. Person ID 1103068
Name LFM Hancock Figaro
Suffix
Address 1 4375 Fair Lakes Ct
CSZ/Cnty
Res Cnty/State FAIRFAX Fairfax County VA Virginia
Country
Phone/Ext/Ty 1 703 Source 1
Origin/Date AL Alumni 11/30/04
SSN
Birth Date 01/12/1961 Address Change
Ethnic/Gender M Date 11/30/04
Mail Codes 1 By MEH
E-Mail Adr 1 PRI
Pref Name Mr. Figaro Hancock
Mail Name 1 Mr. Figaro Hancock
Other LFM 1

List 2/4

Figure 1-28: Displaying One Record of a Group

Toggling Through Multiple Records

To toggle through the records in a group, you must first save or cancel changes to the currently displayed record.

Save a Record and Display Another Record

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

Step 1. Click **Save**. An alert box prompts you to update, cancel or return to editing, as shown in Figure 1-29.

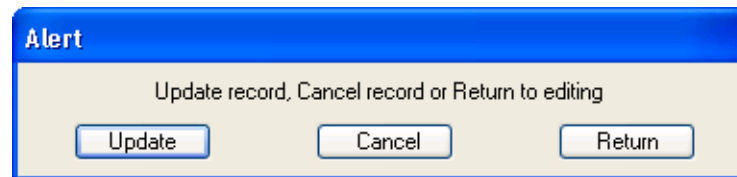


Figure 1-29: Alert Dialog Box: Update, Cancel, or Return

Step 2. Click **Update**. An Alert box is displayed, as shown in Figure 1-30.

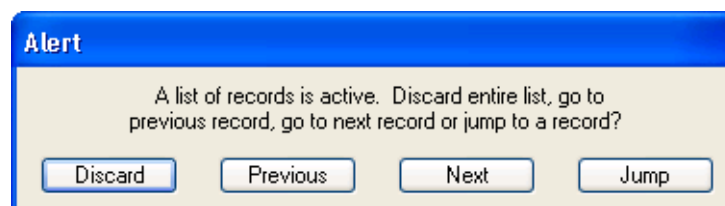


Figure 1-30: Alert Dialog Box: Discard, Previous, Next, or Jump

Step 3. Choose one of the following actions:

- Click **Previous** to move to the previous record in the list.
- Click **Next** to move to the next record in the list.
- Click **Jump** to select a specific record in the list.
- Click **Discard** to discard the entire list.

Cancel Your Changes and Display 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 **Cancel**. An alert box prompts you to cancel or return to editing, as shown in Figure 1-31.

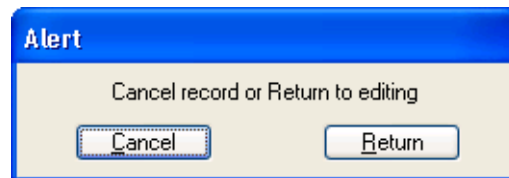


Figure 1-31: Alert Dialog Box: Cancel or Return

Step 2. Click **Cancel**. An alert box is displayed (an example of the alert box is shown in figure 1-30).

Step 3. Choose one of the following actions:

- Click **Previous** to move to the previous record in the list.
- Click **Next** to move to the next record in the list.
- Click **Jump** to select a specific record in the list.
- Click **Discard** to discard the entire list.

LookUp Shortcuts

There are a number of standard LookUp options available to help you with almost all types of LookUp.

In addition to these standard options, many types of LookUp also provide special shortcuts to help you find what you are looking for. See “Person- and Organization-Related LookUp Shortcuts” beginning on page 1-38 for more information about special LookUps.

Standard LookUp Shortcuts

There are several LookUp shortcuts 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 1-2.


When you want to see...	Enter this at the LookUp prompt	Hints
The last record you displayed during this login session.	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 display Fred Smith’s record on the NAE form, and then you access the ADR form, you can retrieve Mr. Smith’s record on the ADR form 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 (. . .)	Due to the size of Person and Organization LookUp, the ellipsis is not supported for these files.
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 a record.

Table 1-2: Standard LookUp Shortcuts

When you want to see...	Enter this at the LookUp prompt	Hints
All records in which a specific field contains a value (that is, the field is not blank).	<p>;fieldname</p> <p>For example, on the Approvals Needed (APRN) form in the Financial System's Accounts Payable module, to see a list of approval records for individuals who are limited in the purchase order amount they may approve, enter the following:</p> <p>;apprv.po.max.amt</p>	
All records in which a specific field's value matches a particular string.	<p>;fieldname string</p> <p>For example, on the Approvals Needed (APRN) form in the Financial System's Accounts Payable module, to see a list of approval records for individuals who can approve up to \$10,000 on a purchase order, enter the following:</p> <p>;apprv.po.max.amt 10000</p>	<p>Text values, such as "Hall," are often case-sensitive.</p> <p>With the exception of a person's name, multiword values must be enclosed within double quotes.</p> <p>You can also look for multiple values at one time. For example, 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, enter the following:</p> <p>;apprv.po.max.amt 10000 15000</p>
All records in which a specific field's value begins with a particular string.	<p>;field string...</p> <p>For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, to see a list of all job skill definitions whose descriptions begin with the word "Typing" or "Type," enter the following:</p> <p>;jsk.desc Typ...</p>	<p>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.</p> <p>Remember that text values, such as "Typ," are often case-sensitive.</p>

Table 1-2: Standard LookUp Shortcuts (cont'd)

When you want to see...	Enter this at the LookUp prompt	Hints
All records in which a specific field's value contains a particular string.	<p>;fieldname ...string...</p> <p>For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, to see a list of all job skill definitions whose descriptions have the word "Typing" or "Type" in them, enter the following:</p> <p>;jsk.desc ...Typ...</p>	<p>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.</p> <p>Remember that text values, such as "Typ," are often case-sensitive.</p>
All records in which a specific field's value ends with a particular string.	<p>;fieldname ...string</p> <p>For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, to see a list of all job skill definitions whose descriptions end with the word "Wpm," enter the following:</p> <p>;jsk.desc ...Wpm</p>	<p>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.</p> <p>Remember that text values such as "Wpm," are often case-sensitive.</p>

Table 1-2: Standard LookUp Shortcuts (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.	<p>;fieldname ...string1...string2</p> <p>or any combination of strings and ellipses to achieve the desired result.</p> <p>For example, on the Job Skill Definition (JSKL) form in the Human Resources System's Personnel module, to see a list of all job skill definitions whose descriptions contained the word "Typing" followed by the number "80," enter the following:</p> <p>;jsk.desc ...Typing...80...</p>	<p>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.</p> <p>Remember that text values, such as "Typing," are often case-sensitive.</p>
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).	<p>;fieldname operator string</p> <p>The following are valid operators:</p> <ul style="list-style-type: none"> • = 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) <p>For example, on the Approvals Needed (APRN) form in the Financial System's Accounts Payable module, to see a list of approval records that were added on or after January 1, 1999, enter the following:</p> <p>;approvals.add.date ge 010199</p>	

Table 1-2: Standard LookUp Shortcuts (cont'd)

Person- and Organization-Related LookUp Shortcuts

The information most commonly used to look for a person or organization is the name of the person or organization. Table 1-3 presents the LookUp shortcuts 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.	<p><code>lastname</code> (at least the first two letters)</p> <p><code>lastname, firstname</code></p> <p><code>lastname, firstname middlename</code></p> <p><code>lastname, firstname middleinitial</code></p> <p><code>firstname lastname</code></p> <p><code>firstname middlename lastname</code></p> <p><code>firstname middleinitial lastname</code></p> <p>For example, to look for or add a new person with the name of Robert Taylor Smith, you could enter any of the following:</p> <p><code>sm</code></p> <p><code>smi</code></p> <p><code>smith</code></p> <p><code>smith, robert</code></p> <p><code>smith, robert taylor</code></p> <p><code>smith, robert t</code></p> <p><code>robert smith</code></p> <p><code>robert taylor smith</code></p> <p><code>robert t smith</code></p>	<p>You must enter an underscore (<code>_</code>) between the parts of multiword names. For example,</p> <p><code>van_dyke, jo_anne</code></p> <p>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,</p> <p><code>sm, ro</code></p> <p><code>ro sm</code></p> <p>LookUp finds any record with a primary, birth, former, or other name like the name entered.</p> <p>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 <code>van_dyke, jo_anne</code>, you would get "Jo Anne Van Dyke."</p>

Table 1-3: Person- and Organization-Related LookUp Shortcuts

When you want to...	Enter this at the LookUp prompt	Hints
Limit a name search.	<p>Enter any of the following after the name:</p> <p>;c city</p> <p>;st state/province</p> <p>;z zipcode/postalcode</p> <p>;f country</p> <p>;y class</p> <p>;s source</p> <p>;ps status</p> <p>For example, to find the Robert Smith whose preferred address is in Boston, enter the following:</p> <p>robert smith ;c boston</p>	<p>You can string together more than one restriction for a search, as long as you separate each element of the search with a semicolon.</p> <p>For example, to find the Robert Smith whose preferred address is in Boston and who is associated with the reunion class of 1954, enter the following:</p> <p>robert smith ;c boston ;y 1954</p>
Search using a particular Social Security or Social Insurance number.	<p>;ss SSN/SIN</p> <p>For example, Mary Browning's Social Security number is 264-99-8765. If she gives you her Social Security number instead of her ID number, enter the following to look her up:</p> <p>;ss 264998765</p>	<p>You may enter hyphens, but they are not necessary.</p>

Table 1-3: Person- and Organization-Related LookUp Shortcuts (cont'd)

When you want to...	Enter this at the LookUp prompt	Hints
Search using an organization's name.	<p>orgname</p> <p>For example, to look for or add a new organization with the name of Universal Office Supplies, you could enter any of the following:</p> <p>universal</p> <p>office</p> <p>supplies</p> <p>universal office</p> <p>universal office supplies</p>	<p>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 enter universal office supplies, you get "Universal Office Supplies."</p>
Limit a name search.	<p>Enter any of the following after the name:</p> <p>;c city</p> <p>;st state/province</p> <p>;z zipcode/postalcode</p> <p>;f country</p> <p>For example, if you wanted to find the Universal Office Supplies in Dayton, you could enter the following:</p> <p>universal ;c dayton</p>	

Table 1-3: Person- and Organization-Related LookUp Shortcuts (cont'd)

Adding Records from a LookUp

You can also use LookUps to add new records from certain forms.

When you want to...	Enter this at the LookUp prompt	Hints
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 enter only joanne t di_marco , then the name is 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.
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 enter only e e cummings Institute , then the name is capitalized as follows: E E Cummings Institute	

Table 1-4: Adding Records from a LookUp Prompt

LookUp Strings

You can 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
```

Viewing Online Help

Online help provides you with detailed information about Envision forms. There are three categories of online help:


- **Field Help.** An explanation of each field on each form.
- **Function Help.** A list of frequently used keyboard shortcuts.
- **Process Help.** An overview of each form.



Note: The **About** command in the **Help** menu enables you to view version and licensing information.

Field Help

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

- Choose **Field Help** from the **Help** menu.
- Click the **Field Help** button  on the toolbar.

Function Help

Keyboard Shortcuts are keystroke combinations that can be used to perform functions that 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** menu. The **HELP and FUNCTION KEY Information** box is displayed, as shown in Figure 1-32.

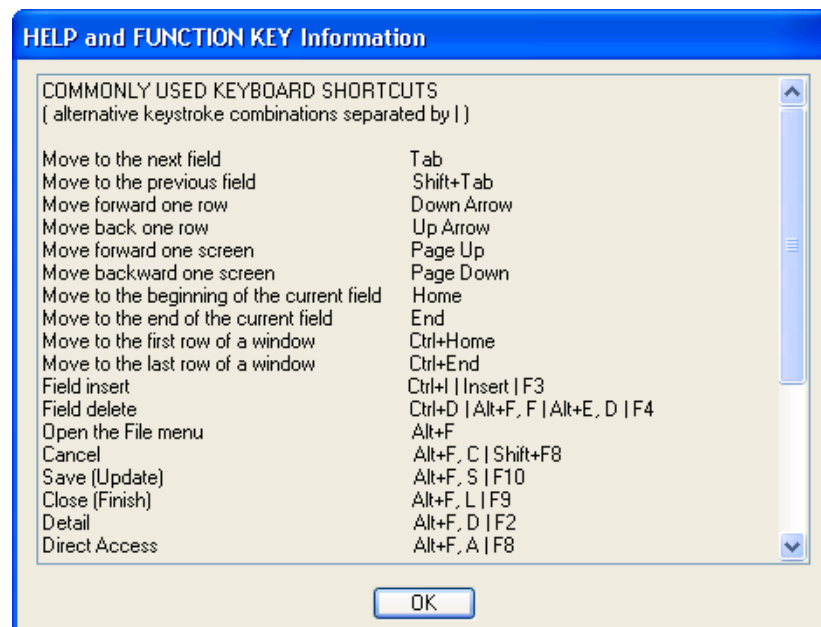


Figure 1-32: Help and Function Key Information Box

Process Help

Process help provides you with an overall description of the purpose of the selected form. It does not provide detailed information about specific fields on a form. To access process help from any location within a form, choose

Process Help from the **Help** menu.

Performing Tasks

In This Chapter

This chapter helps you learn how to use UI with Benefactor or Colleague. It includes an overview for accomplishing various tasks, such as using Query Builder, Importing and Exporting records, Batch Processing, and using the Multiline text editor.

These utilities are wIntegrate products. For detailed instructions for using these utilities, please refer to wIntegrate documentation or online help.



Note: Query Builder, Import File, and Export File are available only to clients using UniData. Clients using SQL Server or Oracle can use the utilities provided with those products.

Query Builder

Query Builder is a UniData utility that Datatel makes available with Colleague and Benefactor. It provides a front end to the query language on your host system.



Note: Because access to Query Builder is governed by Envision security classes, you may need to consult your system administrator to obtain the necessary permissions.

To access Query Builder, choose **Query Builder** from the **Options** menu. The Query Builder dialog box is displayed, as shown in Figure 1-33.



Figure 1-33: Query Builder Dialog Box

Importing and Exporting Files

Import File and Export File are UniData utilities that Datatel makes available with Colleague and Benefactor. Import File and Export File allow you to transfer data to and from your host PC.



Note: Because access to Import File and Export File is governed by Envision security classes, you may need to consult your system administrator to obtain the necessary permissions.

To import or export files from the host PC, choose **Import File** or **Export File** from the **Options** menu. The Import File From Host dialog box is shown in Figure 1-34, and the Export File to Host dialog box is shown in Figure 1-35.

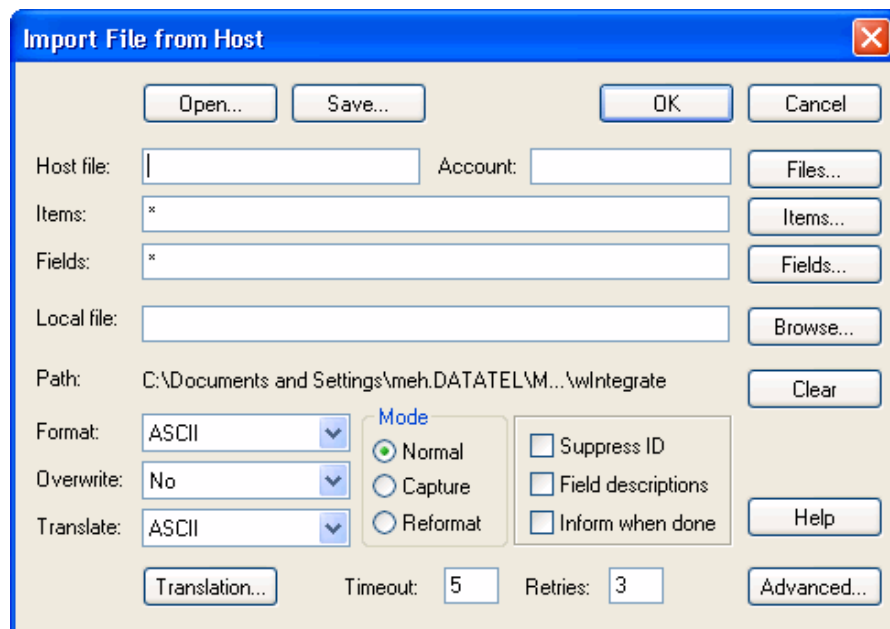


Figure 1-34: Import File From Host Dialog Box

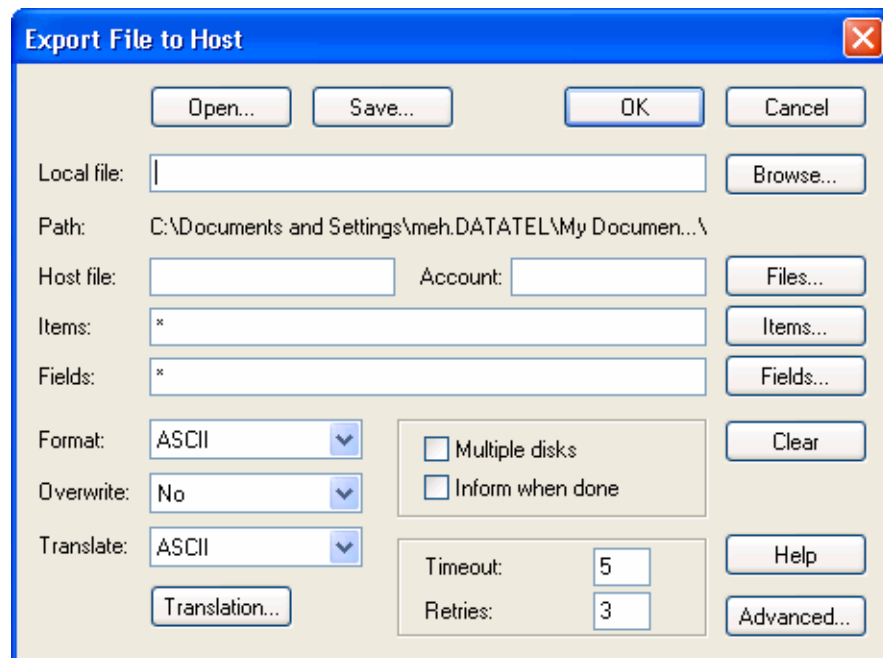


Figure 1-35: Export File to Host Dialog Box

Batch and Report Processes

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

As each process completes, Envision displays a **Finish** prompt. Click **Finish** to start the next process and view its progress. Continue clicking **Finish** as each prompt appears.

To view all of the processes consecutively (without having to click **Finish** for each process), select the **Close automatically when complete** check box.

There are four types of progress bar graphs.

Message Bar Graph

This type of graph displays the messages of a process, without the progress bar.

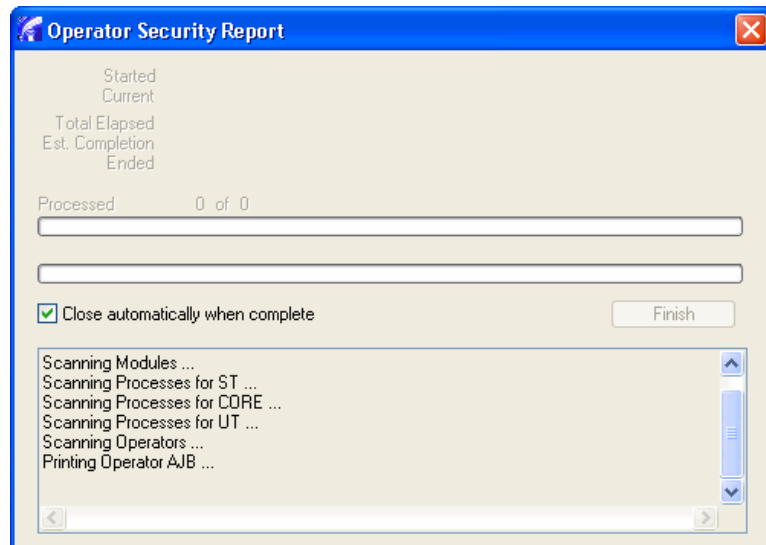


Figure 1-36: Message Bar Graph

Single-Process Bar Graph

This type of graph displays a single process in a bar graph.

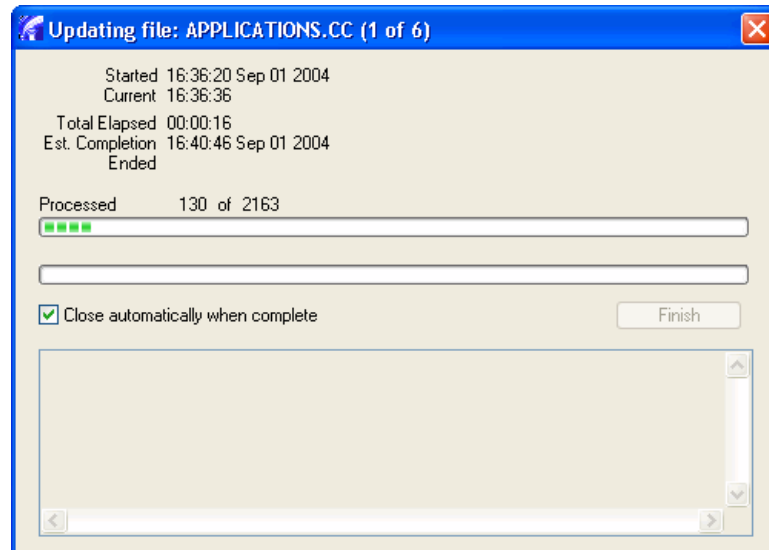


Figure 1-37: Single-Process Bar Graph

Multiple-Process Bar Graph

This type of graph displays more than one process in multiple bar graphs.

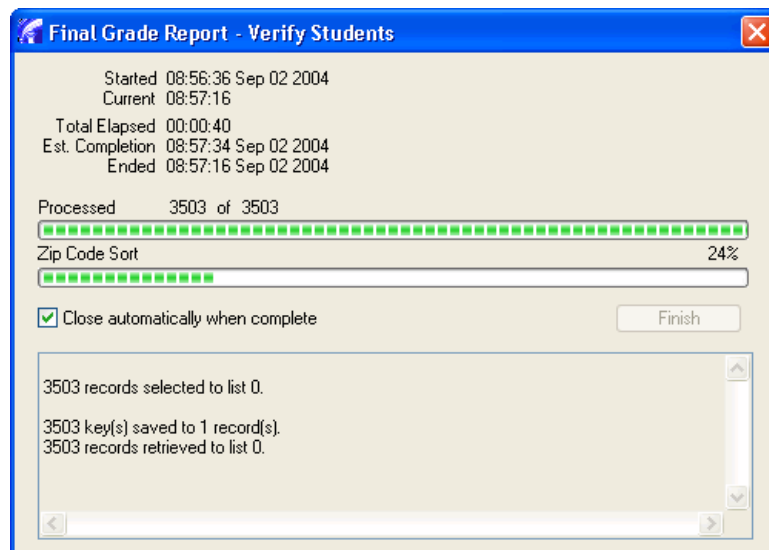


Figure 1-38: Multiple-Process Bar Graph

Terminal Window Bar Graph

This type of graph displays the Process Generator (GEN) and Screen Painter (Painter) processes. Your system administrator can optionally choose to display all of your bar graphs in a Terminal Window. The administrator can also choose to display specific processes in the terminal window bar graph.

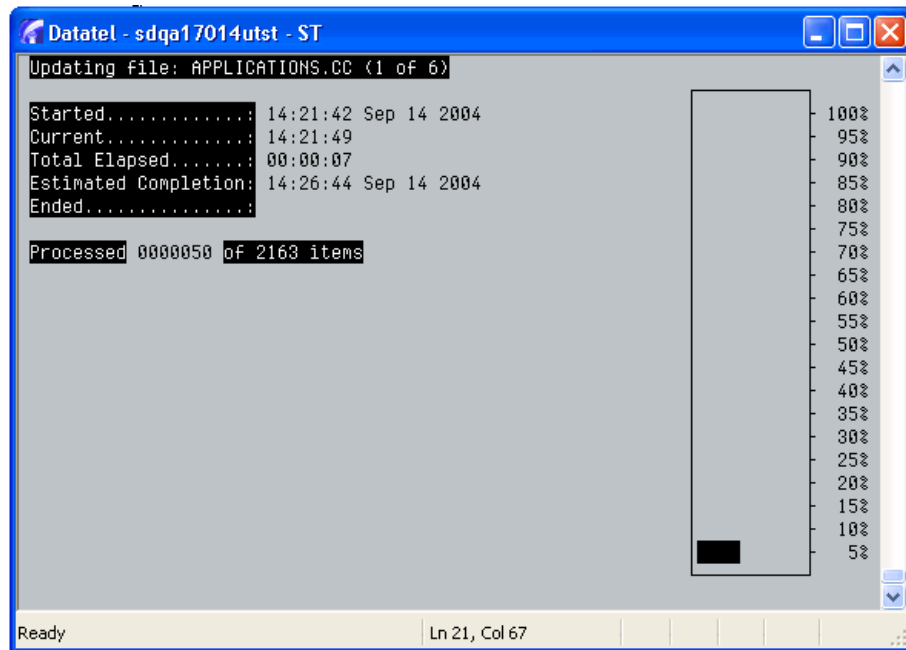


Figure 1-39: Terminal Window Bar Graph

Browsing Reports

The 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, to avoid lengthy download times.



Note: Because the Report Browser delivers the report to the client one page at a time, there is a momentary delay between clicking a page selection button and seeing the page appear on the form.

Procedure for Browsing a Report

To use the Report Browser, perform the following steps:

Step 1. Select the desired report from the treemenu.

Step 2. Enter the desired report parameters, and update from the form.

Figure 1-40 shows an example of the report parameters.

BDEP-Bank Deposit Report

Start Date 05/01/95

End Date 08/04/04

Banks

1	01	General Checking
2	09	Swiss Royal Bank
3		
4		
5		
6		
7		

Additional Selection Criteria No

Figure 1-40: Bank Deposit Report (BDEP) Form

Step 3. On the Peripheral Defaults form, select **H Hold/Browse File Output** in the Output Device field, as shown in Figure 1-41.

Figure 1-41: Output Device Field: Peripheral Defaults Form

Step 4. Continue to complete the forms until a bar graph displays. (See “Batch and Report Processes” on page 1-49.)



Note: Depending on the type of report, Envision displays various forms that you continue to update. For example, many processes generate an error report in addition to the output report. Envision opens a Peripheral Defaults form for each report. Also, Envision often opens the Process Handler form that allows you to set processing parameters.

Step 5. When all records are processed, you are prompted to browse the HOLD files. The Report Browser is displayed. Figure 1-42 shows a typical report page in the Report Browser.

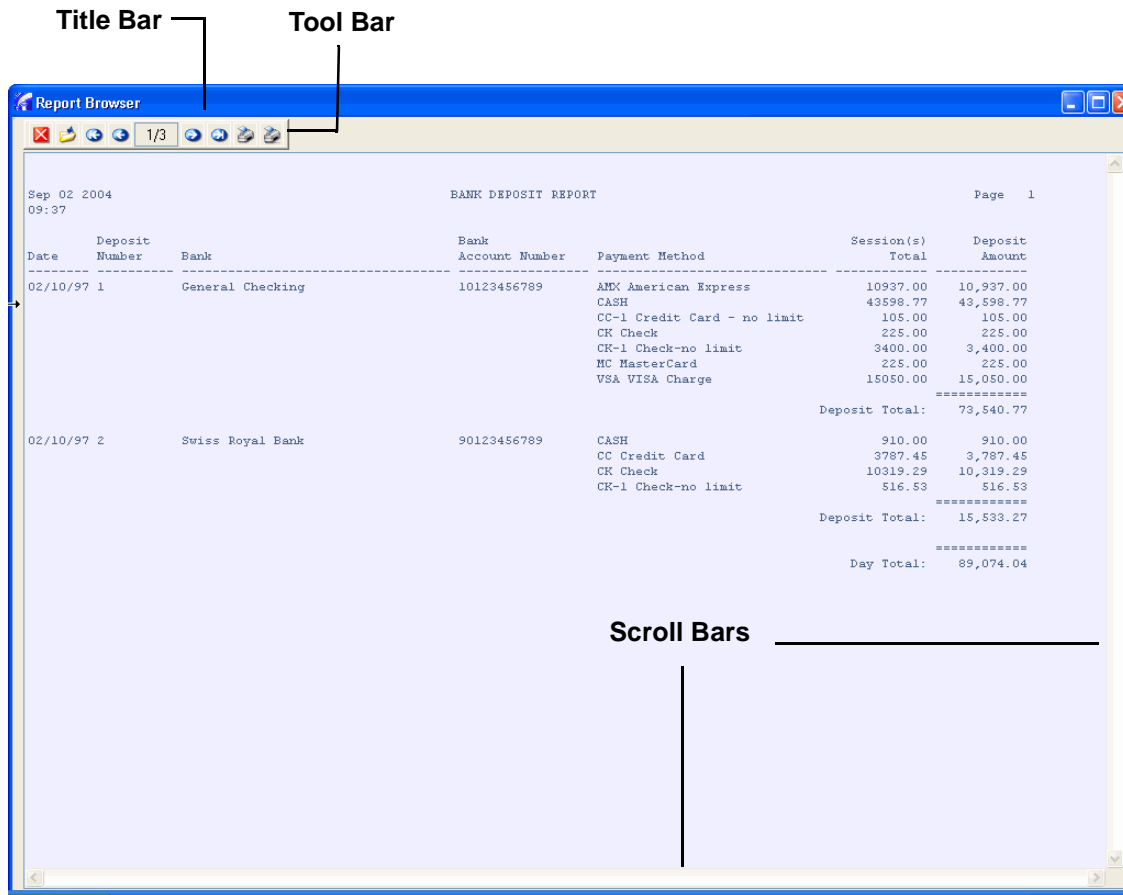


Figure 1-42: Report Browser

Using the Report Browser Toolbar

Use the toolbar buttons, shown in Figure 1-43, to navigate through the report, print the report, or save a copy.

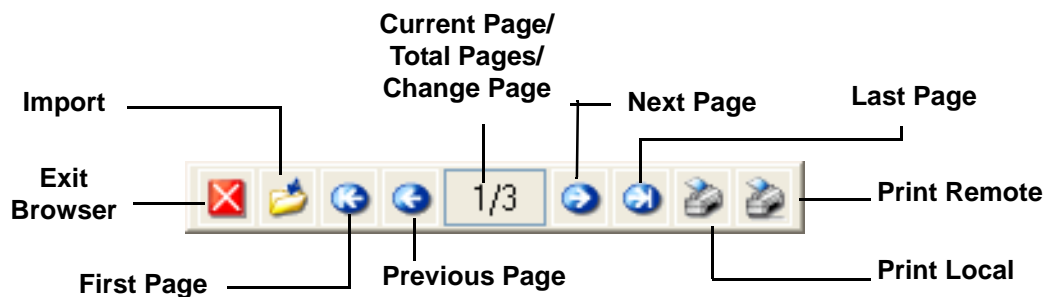


Figure 1-43: Report Browser Toolbar Detail

The Report Browser Toolbar buttons are described in Table 1-5.





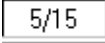


Button	Name	Description
	Exit Browser	Close the Report Browser and return to the application workspace.
	Import	Save a copy of the report to your network or local hard drive. You are prompted to specify a name and path for the saved report.
	First Page	Jump to the first page of the report.
	Previous Page	Move to the previous page of the report.
	Current Page/Total Pages/Change Page	Shows the number of the currently displayed page and the total number of pages in the report. You can also jump directly to any page by typing the page number in this field and then pressing Enter.
	Next Page	Move to the next page of the report.
	Last Page	Jump to the last page of the report.

Table 1-5: Report Browser Toolbar Buttons



Button	Name	Description
	Print Local	<p>Print the report to a local printer (such as 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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>In all cases, make sure that the Use character mapping check box is checked.</p>
	Print Remote	<p>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.</p>

Table 1-5: Report Browser Toolbar Buttons (cont'd)

Setting Report Browser Preferences

You can resize the browser window to fit any selected report. If the entire report does not fit on the form, vertical and horizontal scroll bars enable you to view any part of it, as shown in Figure 1-42 on page 1-54. To customize the font, background color, and text color, choose Font or Change Colors from the Options menu. See “The Multi-Line Text Editor” beginning on page 1-58 for information on setting report browser colors and fonts.

Adding a Database

When you initially install UI on your PC, you have access to only one database. Before you can access additional databases, you or your administrator must add them. Adding a database connects you to the Colleague and Benefactor accounts that you need to access.

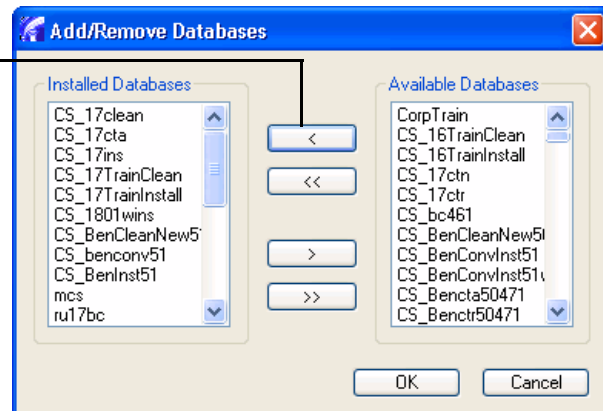
Use this procedure if you are adding a database from the Options menu in UI. System Administrators can also add a database from the Datatel User Setup program. For instructions for doing so, refer to *User Interface Installation and Administration*.

Procedure for Adding a Database

Step 1. From the Options menu in UI, select **Add/Remove Databases**.¹

The Add/Remove Databases window displays.

Click to
add a
database



Step 2. Select the available databases (listed in the Available Databases window) that you want to be able to access through UI Desktop. 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.

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

The Multi-Line Text Editor

UI 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 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 Text” on page 1-63.



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 Desktop or Web Installation and Administration.

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 when you have a large amount of text to enter. An example of a single-line text editor form is shown in Figure 1-44 on page 1-59.

The multi-line text editor form lets you enter free-form text without entering hard returns. The text wraps automatically as you type. An example of the multi-line text editor is shown in Figure 1-45 on page 1-59.

CRSE-Courses UTEC-Course Description

Comments

1 eginning level course in witten composition. The emphasis is on

2 grammar, sentence structure, paragraph structure a

3 expository essay. Three papers are required.

4

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7

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15

Figure 1-44: Example of a Single-Line Text Editor Form

CRSE-Courses UTEC-Course Description

Comments

Beginning level course in written composition. The emphasis is on grammar, sentence structure, paragraph structure and the expository essay. Three papers are required.

Figure 1-45: 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 form “loads” the text one form, 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 field². 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 1-46.

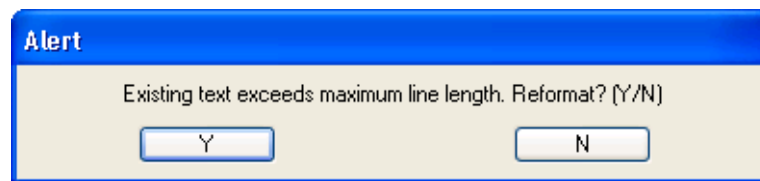


Figure 1-46: Text Exceeding Maximum Line Length Alert Message

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

Figure 1-47 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.

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

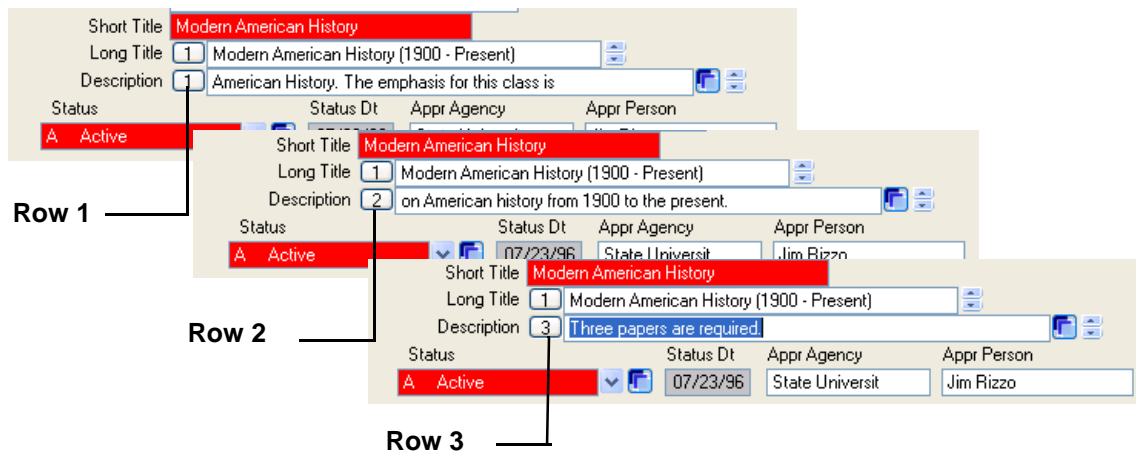


Figure 1-47: Example of Text Exceeding Maximum Line Length

If you use the multi-line text editor and want to keep text as it 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 1-48, the actual format will not be altered.

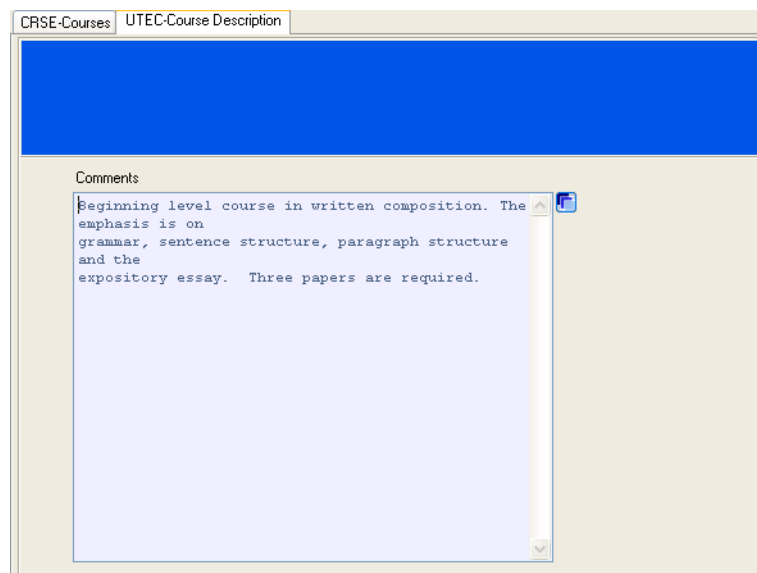


Figure 1-48: Multi-Line Text Editor in Inquiry-Only Mode

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 1-49.

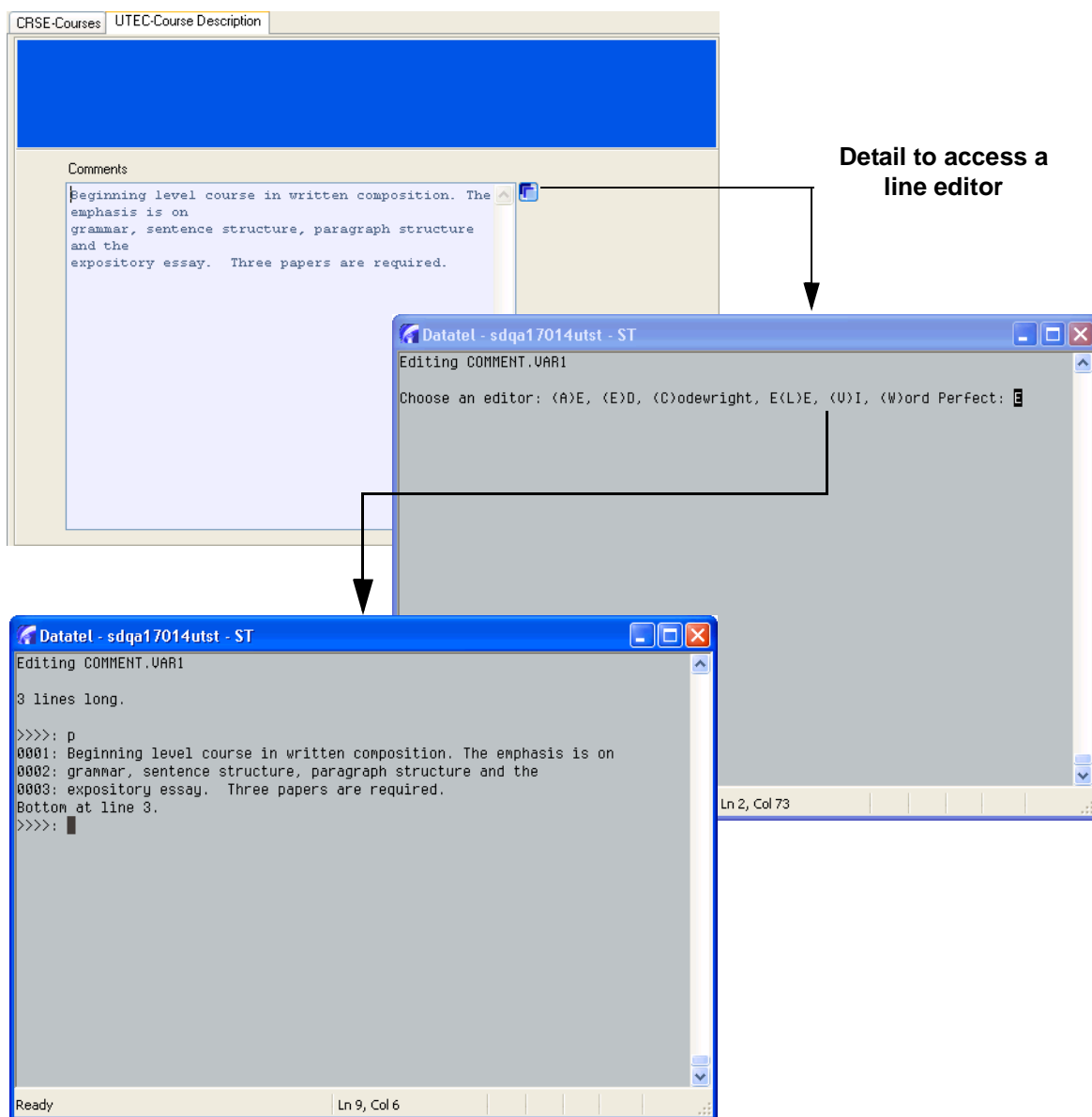


Figure 1-49: Detailing from the Multi-Line Text Editor in Inquiry-Only Mode

However, if you select **Y** on the Alert dialog box, the text reformats in the text editor. You can make changes, but if you save the information (without cancelling), the text retains the new format. An example of the multi-line text editor in edit mode is shown in Figure 1-45.



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

Copy and Paste Text

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 1-50.

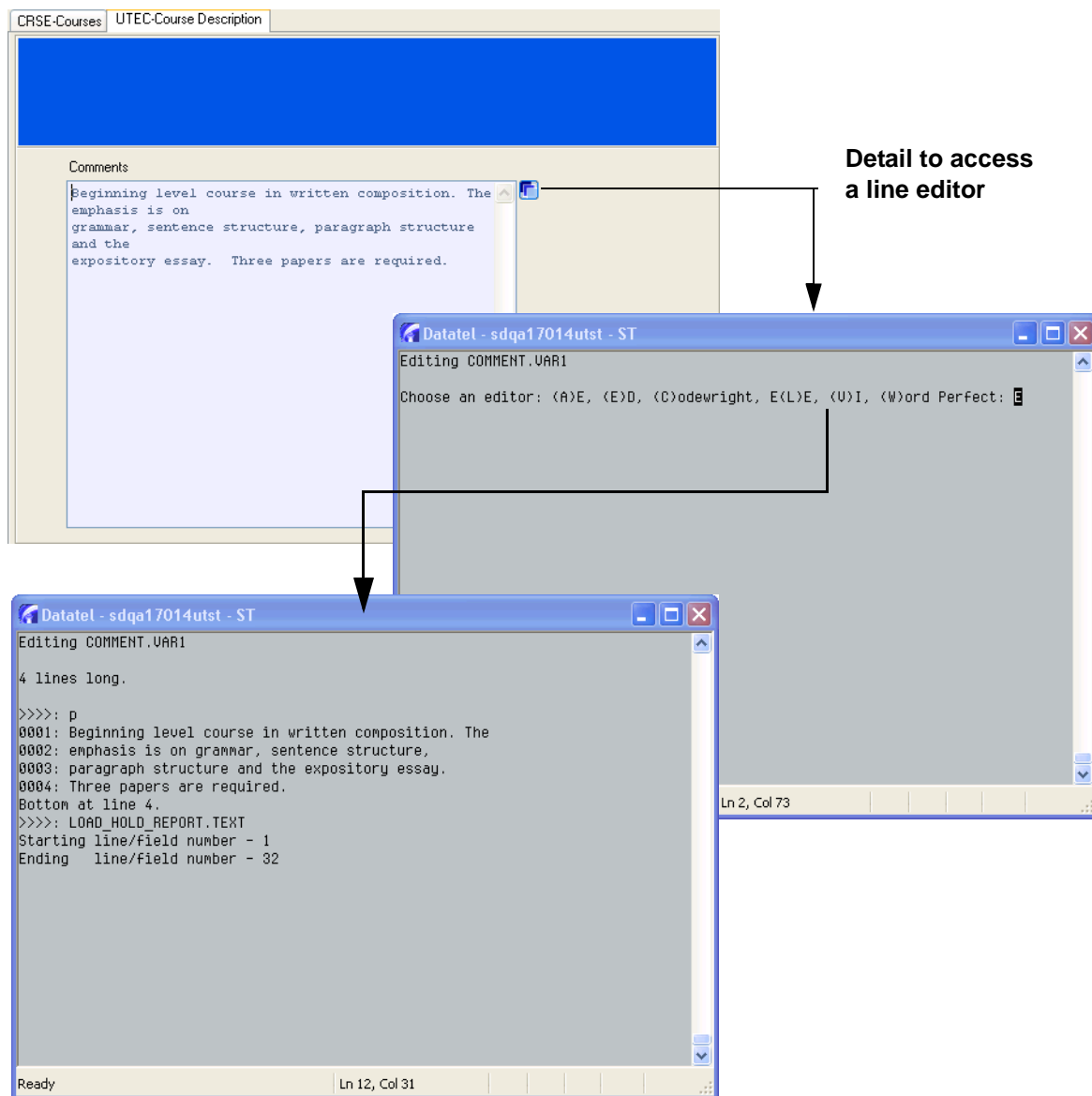


Figure 1-50: Detailing from the Multi-Line Text Editor to a Line Editor

If the text you load exceeds the length of the maximum line length, the Alert message displays (as shown in Figure 1-46 on page 1-60). Select **Y** to reformat the loaded text, or select **N** to ignore any changes.

Date and Time Stamp

With the single-line text editor, you can use the pound key symbol (#) to date and time stamp your text. You can use the Date/Time/Login option from the Edit menu as shown in Figure 1-51.

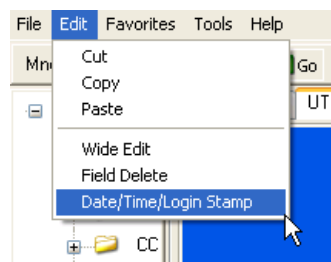


Figure 1-51: Example of the Date/Time/Login Option



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

Customization

In This Chapter

This chapter helps you learn how to customize the look and feel of UI with Benefactor or Colleague. It includes instructions for defining user preferences and field customization.

Defining Your Preferences

UI provides you with a way to personalize the look and feel of how the forms appear on your PC. You can define your preferences for the following:

- Font
- Colors
- Favorites

UI supports multiple user settings on one PC. If a PC is shared by more than one user, UI maintains individual color settings, font sizes, and favorites menus for each user ID.

Defining Fonts

You can use the Fonts dialog box to change the text fonts that are used in forms, reports, resolution forms, and the multi-line text editor.



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 forms may not display correctly using large fonts.

Procedure for Defining Font Preference

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 1-52.

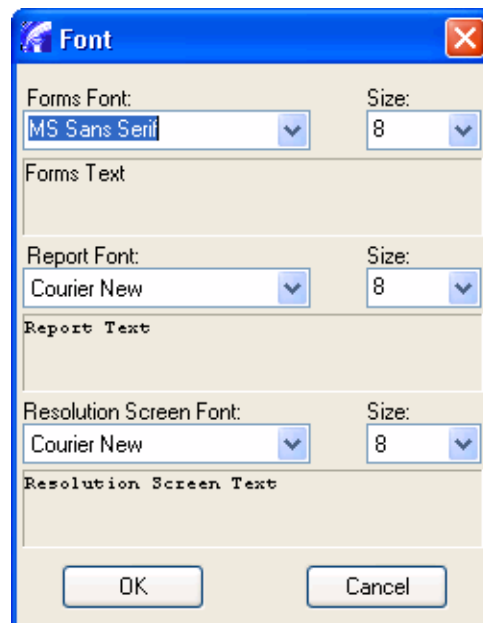


Figure 1-52: Font Dialog Box

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



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.

UI supports proportional fonts; however, resolution forms 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 set for the resolution form is the same font that will be used by the multi-line text editor. For information about the multi-line text editor, see “The Multi-Line Text Editor” on page 1-58.

Defining Colors

You can use the Color options to change the colors of a variety of form attributes. Follow these steps to define your color preferences:

Step 1. From the Options menu, choose **Change Colors**. The Visual Attributes dialog box displays, as shown in Figure 1-53.

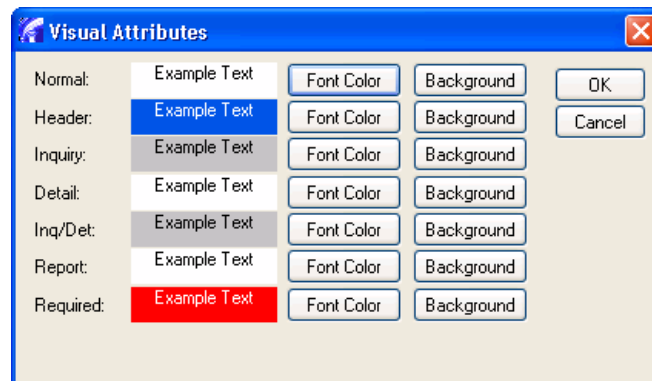


Figure 1-53: Visual Attributes Dialog Box

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 displays, as shown in Figure 1-54.

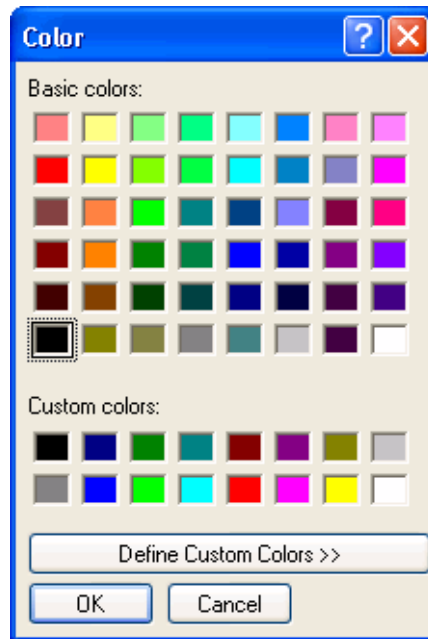


Figure 1-54: Color Palette

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.

Defining Favorites

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

Procedure for Adding Favorites

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

- Step 1.** Select the form that you want to add to your list of favorites.
- Step 2.** Select Add to Favorites from the Favorites menu.
- Step 3.** Click the **Add to Favorites** pop-up. The Add Favorite dialog box displays, as shown in Figure 1-55.

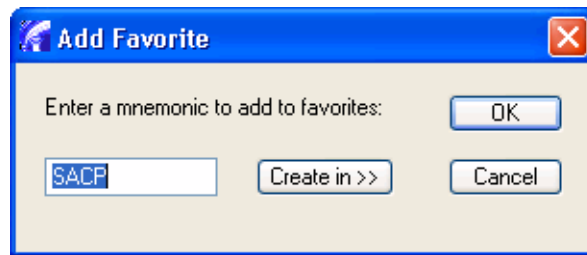


Figure 1-55: Enter a Mnemonic Dialog Box

- Step 4.** Enter the mnemonic of the favorite form.
- Step 5.** 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 1-56.

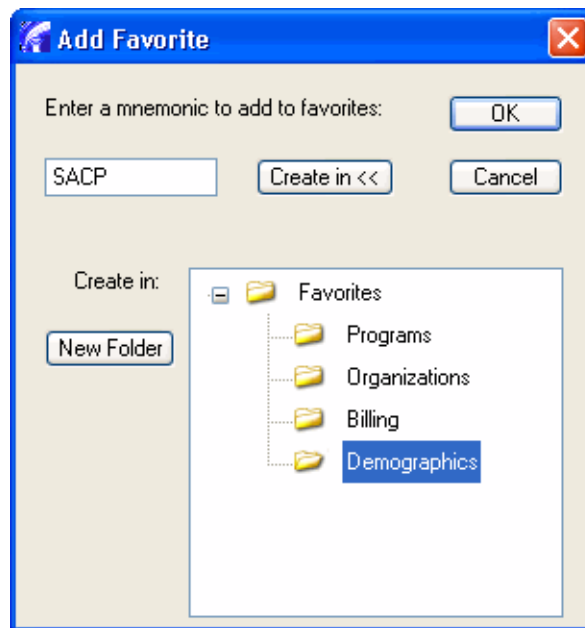


Figure 1-56: Selecting a Folder for a Favorite



Note: See “Organizing Favorites” beginning on page 1-73 for more information on organizing Favorites in folders.

Step 6. Click **OK** to add the form to your customized Favorites list.

The shortcut is added to your Favorites drop-down menu, as shown in Figure 1-57.

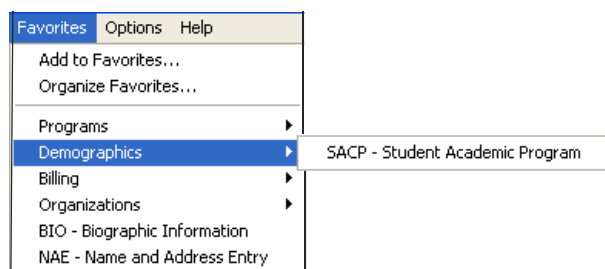


Figure 1-57: Favorites Drop-Down Menu



Note: To display the Enter a Mnemonic dialog box and add a shortcut to Favorites without first selecting the form from the treemenu, 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 1-55 on page 1-71.

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.

Procedure for 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 1-58.

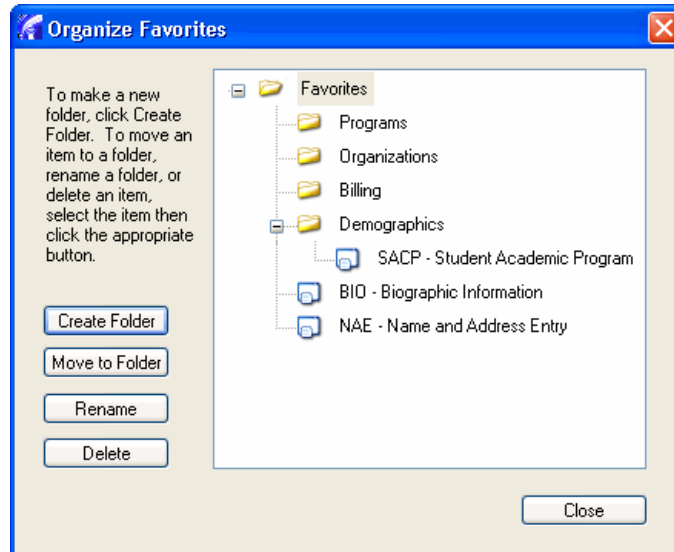


Figure 1-58: Organize Favorites Window

Step 2. Click **Create Folder** to display the Create Folder dialog box, as shown in Figure 1-59.

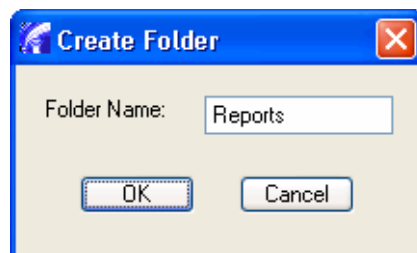


Figure 1-59: Create Folder Dialog Box

Step 3. Enter a name for the new folder, such as “Reports,” and click **OK**. The new folder appears in the Organize Favorites window, as shown in Figure 1-60.

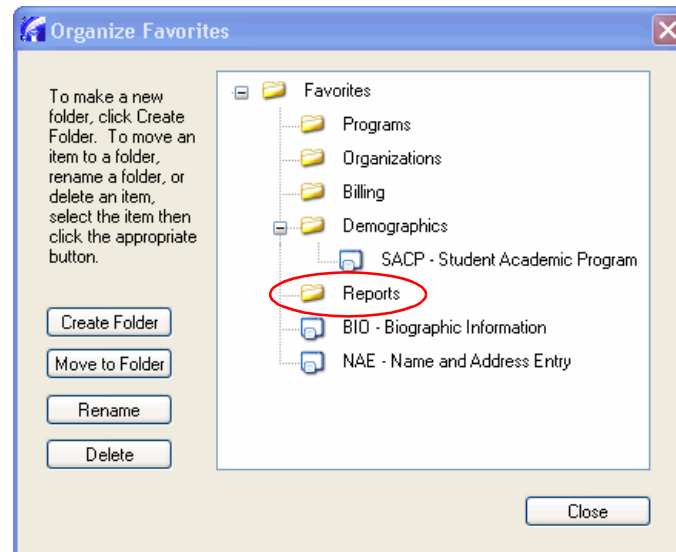


Figure 1-60: New Folder

Procedure for 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 1-61.

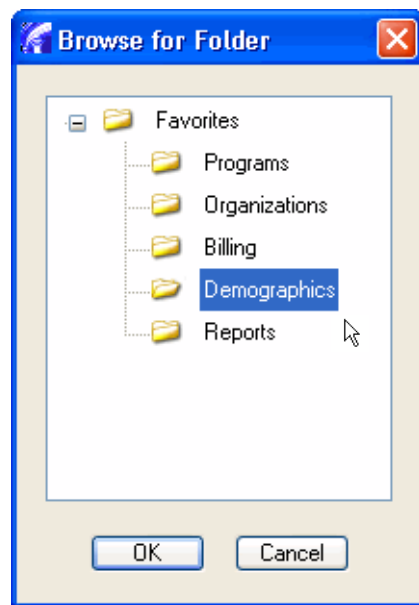


Figure 1-61: Folder Selection Window

Step 4. Click **OK**. The shortcut is moved to the folder.



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

Procedure for 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.

Procedure for 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 deleted only the shortcut in the Favorites drop-down menu.

Field Customization

The behavior for each field on each form is originally defined by Datatel. The System administrator at your institution can use the Envision Tool Kit to further define field behavior. A third level of field customization allows you, the end-user, to modify certain field behaviors for the forms that you access.



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

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

- **Field Sequence.** Specify which field the cursor appears in when a user first accesses the form, and the path followed through the form each time a user presses the TAB key.



Field Access. Indicate which fields on the form are required. You can also indicate whether a field is Inquiry Only or No Access.

Limitations

You cannot take away behavior that either Datatel or your system administrator has already defined in the Tool Kit. For example, if a field is set in the Tool Kit as Required, it is always required.

See Figure 1-62 for an example of the Customize Field Properties dialog. The example shows customization of the NAE form, but any Envision form can be customized.

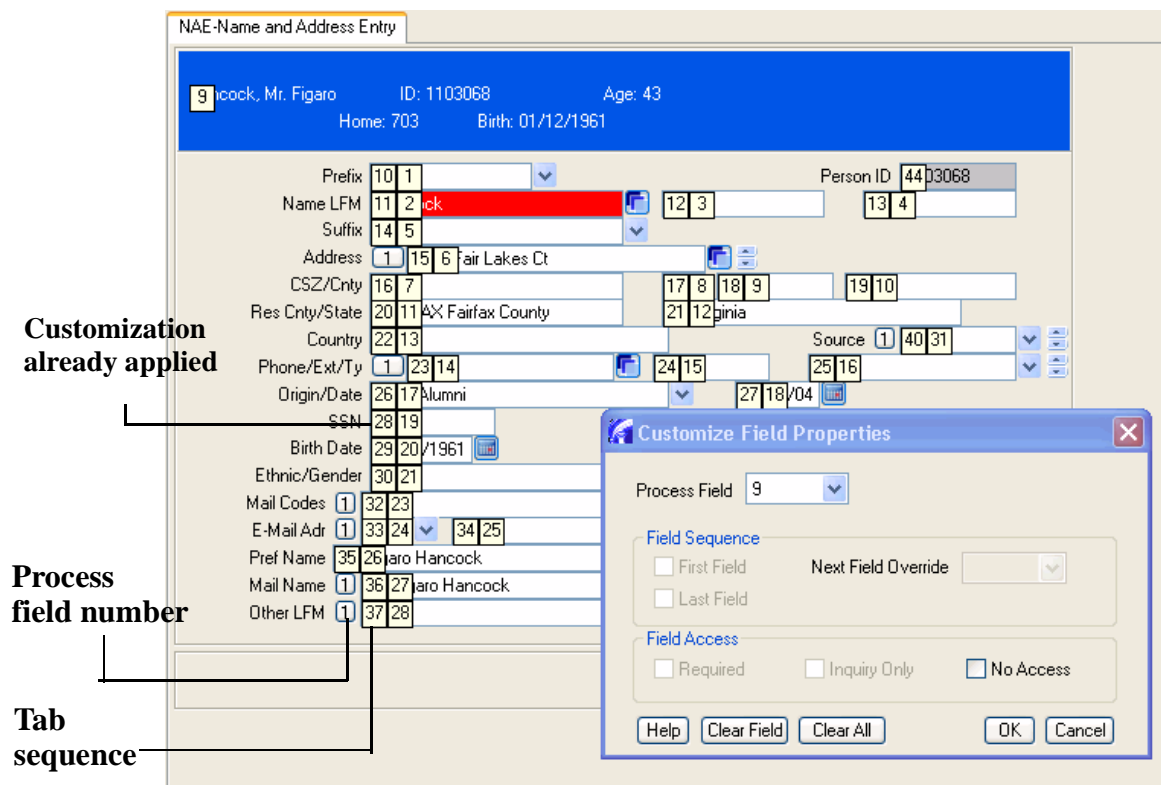


Figure 1-62: Customize Field Properties Dialog



Technical Tip: When you access the Customize Field Properties dialog from a form, you can view existing customizations for that form. A series of tool tips indicates the process number of each field, as well as the tab sequence of each field. Tool tips are the numbered boxes that display when this option is enabled.

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

Customizing Field Sequence



You can use field customization to determine the tab sequence of fields on a form. Customizing your field sequence can help you move through a form more quickly than you would if you had to tab through each field on the form.

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 (skipping any fields not in the tab sequence). If you specify a last field, the form updates when you tab from the last field in your customized tab sequence.

If tab sequencing is not specified, the default sequence is used.

Customizing Field Access

You can use the Field Access feature to select a security control for fields on a form. If field access is not specified, the default User Interface form behavior occurs.

You can select one of the following options:

- **Required.** A field on a form is required. Users cannot finish from the form 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) form, it is always Denied Access (Denied Access performs the same functionality as No Access).

Field Customization Restrictions

The behavior for each field on each form 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, subsequent users may still create a tab sequence for themselves, and that tab sequence will apply only to their own sessions.

- Field access precedence is inclusive. If 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.
- Other fields that cannot have a Next Field Override include: fields contained in the header block and 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 form'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 Form

You might 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 form you wish to customize.

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

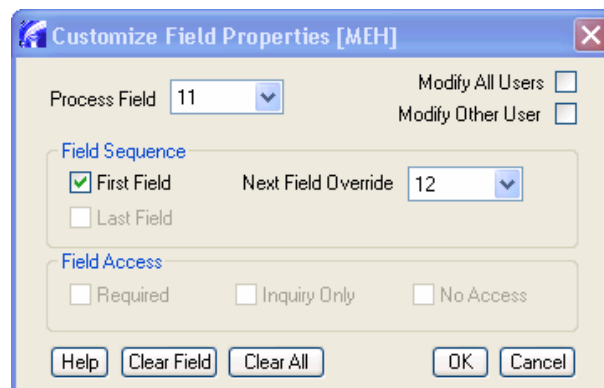


Figure 1-63: Customize Field Properties Dialog

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 form 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 form 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 form you customized.

Step 2. From the Tools menu, do one of the following:

- Select **Disable Custom Field Sequence** to disable the custom field sequencing. A check displays next to this option when field sequencing is disabled.
- De-select **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 form and return, field sequencing will be enabled again.

Procedure for Showing Field Sequence

You can optionally display the current field sequence of a form. 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 form you customized.

Step 2. From the Tools menu, do one of the following:

- Select **Show Field Sequence** to view the field sequence.
- De-select **Show Field Sequence** to view the form without displaying the field sequence.

Guide to User Interfaces

2. Character Interface

About the Character Interface

In This Chapter



Technical Tip: The Character interface is not available for Colleague R18 and later.

This chapter provides a brief introduction to some of the terms and concepts you will encounter in using Envision-based modules in Colleague and Benefactor. This chapter is divided into the following sections:

- **Function Keys** — where we provide a list and description of each of the function keys available with Envision-based modules.
- **Form Types** — where we present an example of each of the four types of Envision forms.
- **LookUp** — where we describe the LookUp feature and provide an example of its use.
- **Groups** — where we provide an illustration of the components of a group.

Function Keys

Table 2-1 provides a list of Benefactor and Colleague function keys.

Throughout the Colleague and Benefactor documentation you will find that we refer to these keys by their functions rather than by specific key names. This is because their key assignments may vary from keyboard to keyboard. We have provided a blank column in this table where you may make a note of the keys on your keyboard that correspond to these functions.



Note: Once you determine which key corresponds to Function Key Help (Funcnt HELP), then you can press Funcnt HELP to find out what the rest of the key assignments are.

Keyboard	Function	Function Description
General		
	CANCEL	Cancels changes made to current record.
	DETAIL	Displays detail form (cursor must be positioned on a field marked with an asterisk).
	DIRECT ACCESS	Invokes another process from current process form without returning to menu. If current process form has a LookUp prompt, respond to prompt before pressing this key. Next, press Enter to continue, then enter mnemonic of next process.
	EXIT	Exits from current form and returns to menu from which it was accessed. If you used DIRECT ACCESS to display this form, you are returned to the menu from which the first process form was accessed.

Table 2-1: List of Function Keys Available with Envision-Based Modules

Keyboard	Function	Function Description
	FINISH	Exits from current form and returns to menu from which it was accessed. If you used DIRECT ACCESS to display this form, you are returned to the form you were on when you pressed DIRECT ACCESS. Press Enter to save your work or CANCEL if you do not want to save your work.
	Field HELP	Displays a one-line message. Press Enter to view a longer help message or Field HELP to view a list of field values.
	Funct HELP	Provides a list of function keys and the keys to which they correspond on your keyboard.
	Process HELP	Displays general overview of process.
	Record DELETE	Deletes current record (available only on certain forms).
	REFRESH	Redisplays current form, erasing extraneous data or system messages.
	UPDATE	Exits from current record, redisplay current form, and prompts for a new record ID. Press Enter to save your work or CANCEL if you do not want to save your work.
Field Movement		
	Field BACK	Moves cursor back to previous field.
	Field FWD	Moves cursor forward to next field.
	Field JUMP	Jumps to a specified field.

Table 2-1: List of Function Keys Available with Envision-Based Modules (cont'd)

Keyboard	Function	Function Description
Window Movement		
	Element BACK	Moves cursor to previous window element.
	Element FWD	Moves cursor to next window element.
	Window BACK	Moves cursor to previous window group.
	Window BOTTOM	Moves cursor to last window group.
	Window FWD	Moves cursor to next window group.
	Window INSERT	Inserts window group just before current group.
	Window JUMP	Jumps to a specified window group.
	Window Page DOWN	Moves cursor to next page.
	Window Page JUMP	Jumps to a specified window page.
	Window Page UP	Moves cursor to previous page of window.
	Window TOP	Moves cursor to first window group.
Form Movement^a		
	Form FWD	Moves to next the form.
	Form BACK	Moves to the previous form.
	Form JUMP	Jumps to a specified form.

Table 2-1: List of Function Keys Available with Envision-Based Modules
(cont'd)

Keyboard	Function	Function Description
Editing		
	Right-arrow	Moves cursor right.
	Left-arrow	Moves cursor left.
	BACKSPACE	Moves cursor left and erases characters as you go.
	Char DELETE	With in-line editing on, deletes current character.
	Char INSERT	With in-line editing on, inserts characters at the current cursor location.
	DEL	Clears current field.
	End of Line CLEAR	With in-line editing on, clears field from cursor position to end of field.
	Insert/Overwrite	Switches in-line editing on (insert mode) and off (overwrite mode). An asterisk is displayed in the lower right-hand corner of the form when in-line editing is off.
	TAB	Moves cursor eight spaces to right.

Table 2-1: List of Function Keys Available with Envision-Based Modules (cont'd)

- a. Supports movement among chained forms. Chained forms are a group of Envision forms that support a particular workflow. Chained forms are not delivered by Datatel but can be customized at your site.

Form Types

Menu

A menu, as shown in Figure 2-1, is an organized list of Benefactor or Colleague functions.

04/02/98 15:38 Person Demographics Core System
Datatel, Inc. Colleague 14.1

TDB

1 NAE	Name and Address Entry	11 EMER	Emergency Information
2 BIO	Biographic Information	12 DADD	Additional Demographics
3 ADSU	Address Summary	13 FINF	Foreign Person Information
4 ADR	Person Addresses	14 FNM	Formatted Names
5 PPIN	Personal ID Numbers	15 EMAL	E-Mail Information
6 EMPL	Employment Information	16 PSL	Person Saved List
7 SPO	Spouse Information	17 SASU	System Access Setup
8 REL	Relation Information	18 APIN	Assign PINs to Individuals
9 IASU	Institutions Attended Summary	19 BURE	Build User Registry Entries
10 ORCS	Organization Contact Summary		

Enter Mnemonic or Selection Number, or press FINISH: NAE

Press HELP for assistance

Figure 2-1: Menu Form

Process Form

A process form, as shown in Figure 2-2, is a form you use to perform a Benefactor or Colleague function.

Header Block

04/03/98 10:24 NAME AND ADDRESS ENTRY NAE

Data Area

1 Prefix.....: Person ID:
2 * Name LFM.....:
3 Suffix.....:
4 * Address 1:
5 Cty/St/Zp/Cnty.:
6 Res Cnty/State.:
7 Country.....: 18 Source: 1:
8 Phone/Ext/Type.: 1:
9 Origin/Date.....:
10 SSN.....: Address Change
11 Birth Date.....: 19 Source:
12 Ethnic/Gender...: Date...:
13 Mail Codes.: 1: By.....:
14 E-Mail Adr.: 1:
15 Pref Name...:
16 Mail Name...: 1:
17 Other LFM...: 1:

LookUp/Short Help Area

Person Lookup:

Figure 2-2: Process Form

Some process forms contain detail fields. A detail field is preceded by an asterisk (*), which indicates that you can access another form — a detail form — from the detail field.

Some process forms also contain groups, as shown in Figure 2-3. A group is a field that may contain multiple values for a given data item. Note that groups may also contain detail fields.

03/30/98 09:41 RELATION INFORMATION REL

1 * Spouse ID	----- Spouse Name -----	Birth Last Name	Source	
2 * Child ID	----- Child Name -----	Gen	Birthday	Source Class
1:				
2:				
3:				
3 * Parent ID	----- Parent Name -----	--Relation--	Source	Class
1:				
2:				
4 * Other ID	----- Other Relation Name ---	--Relation--	Source	Class
1:				
2:				
3:				

Person LookUp: _

Figure 2-3: Process Form Containing a Table

Inquiry Form

Inquiry forms, as shown in Figure 2-4, are much like process forms except that you cannot enter or change data.

03/30/98 09:43		BIOGRAPHIC INQUIRY		B101	
Preferred...: Maiden Name: 1 Other Names: 1: Spouse Name:			2 Reunion Classes 1: 3 Sources 1:		
4 Phones...: 1: 2:		Sex.....: Ethnic...: Birthday: Deceased:		Research....: Anonymous...: Entry Date...: Last Changed:	
SSN.....:					
Status.....:					
ADRI Address		COMI Communication			
RELI Relations		EMPI Employment			
Person LookUp: _					

Figure 2-4: Inquiry Form

On-Line Help Form

Help forms, as shown in Figure 2-5, provide process, field, and function key help messages.

Process Help

03/30/98 09:58

RELATION INFORMATION

REL

Use the Relation Information (REL) screen to view and enter data about spouses, children, parents, contacts, and friends. Each relation you enter is assigned a system ID. This screen provides a "snapshot" view of all relationship information entered for the person whose data is displayed in the header block.

The relationships established using this screen and the corresponding Additional Relation Info (RELE) screen are reciprocal. That is, the related person's record is updated to show a relationship to the person whose information appears in the header block. For example, if you modify Greg Smith's record by entering a daughter, Katie, in the Child ID window on the REL screen, and save the record, when you access Katie's record using REL, her record shows Greg as her

HELP information for the process DMSU04

Press CANCEL to return to screen, RETURN to continue:

Figure 2-5: Help Form

- Press *Process HELP* for an overview of what the current form does.
- Press *Field HELP* for an explanation of the current field. Press *Field HELP* twice for a list of valid field values, where applicable.
- Press *Funct HELP* to display a list and description of all function keys.

LookUp

Before you can work with something, such as a donor record or a budget, you must identify the particular something, such as the exact donor record or exact budget, to Benefactor or Colleague. To assist you in finding the record you need, both Benefactor and Colleague provide the LookUp feature.

Basic LookUp

Enter the key, or ID, of the record you want at the LookUp prompt, as shown in Figure 2-6. The information associated with that record is then displayed for you. For example, Joe Smith's ID number is 1035806. Enter **1035806** at the Person LookUp prompt on the Spouse Information (SPO) form to display Joe's spouse information record.

03/30/98 10:21 SPOUSE INFORMATION SP0

1 Source...: 1:	Spouse ID....:
2 Prefix...:	Reunion Class:
3 Name LFM...:	
4 Suffix...:	
5 Pref Name:	
6 Mail Name: 1:	
7 Birth LFM:	
8 Other LFM: 1:	
9 Address...:	
10 Mail Codes...: 1:	--Person Preferred Residence--
11 Joint Mail...:	
12 Joint Solicit:	
13 Salut:	
14 Label: 1:	--Spouse Preferred Residence--
15 Marriage Date:	
16 Marital Stat.:	
17 Divorce Date:	

Person LookUp: 1035806

03/30/98 10:22 SPOUSE INFORMATION SP0
Smith, Mr. Joe ID: 1035806

1 Source...: 1: A Alumni	Spouse ID....: 0000020
2 Prefix...: Mrs.	Reunion Class:
3 Name LFM: Smith	Mary
4 Suffix...:	Anne
5 Pref Name: Mrs. Mary A. Smith	
6 Mail Name: 1: Mary A. Smith	
7 Birth LFM: Jones	Mary
8 Other LFM: 1: Sanders	Mary
9 Address...:	Anne
10 Mail Codes...: 1:	--Person Preferred Residence--
11 Joint Mail...:	
12 Joint Solicit:	
13 Salut:	
14 Label: 1:	--Spouse Preferred Residence--
15 Marriage Date:	
16 Marital Stat.: M Married	
17 Divorce Date:	

Press FIELD JUMP to make changes, RETURN to confirm or CANCEL to abort:

Figure 2-6: Example of Basic LookUp

More About LookUp

The real power behind LookUp comes into play when you do not know the record key. LookUp provides options that help you find the record you need with the information you do have.

For example, the key to a donor record is the donor's ID number. If you don't know the ID for the donor record you need, you can enter the donor's name (full or partial) instead.

See the online help for a LookUp field for specific information about the LookUp options available.

Tables

Tables, as shown in Figure 2-7, are special fields that let you store more than one value for a given data item. They are, therefore, sometimes referred to as multivalued fields.

The following are the components of a table:

- **Row.** Each numbered item in a table is a row.
- **Controller.** The first data item in a table.
- **Element.** Any data item in a table.

The status line, located at the bottom of the form, displays information to help you use table.

04/02/98 15:42		RELATION INFORMATION				REL
Smith, Mr. Joe		ID: 1035806				
Element	1 * Spouse ID	----- Spouse Name -----	Birth	Last Name	Source	
Controller	0000020	Mrs. Mary A. Smith	Jones		Alumni	
Row	2 * Child ID	----- Child Name -----	Gen	Birthday	Source	Class
	1: 1055695	Dillon J. Smith	M			
	2: 1055696	Wynona Smith	F			
	3:					
	3 * Parent ID	----- Parent Name -----	--Relation--		Source	Class
	1:					
	2:					
	3:					
	4 * Other ID	----- Other Relation Name ---	--Relation--		Source	Class
	1:					
	2:					
	3:					
Status Line	Controller Child Info Value 1/2					

Figure 2-7: Example of a Table