

# IFAS 7i Navigation

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## Navigation Information

### Overview

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**Introduction** The 7i version of IFAS is in the form of a website browser window. The following information describes the new window, icons, and menu options.

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**In this chapter** This chapter contains the following topics.

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## Before You Begin

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**Introduction** The following information describes tasks that you must complete before you begin working on the IFAS 7i screen for the first time.

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**Allow pop-ups** The first time you open the screen in IFAS 7i, a message appears in the browser advising you to allow pop-ups for this website. Click on the message and choose the option, *Always allow pop-ups on this site*.

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**Enable Workflow** The first time you click the Workflow tab in the IFAS 7i screen sidebar, you will see an Enable button. You must click the Enable button before you can begin using this feature.

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**Choose ledger** If you need to use another ledger when entering items in the screen, you must choose the ledger option the first time you enter the information in the Key-Object field.

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**About blank** If the program stalls when you open an IFAS 7i window and the message at the top of the screen says About Blank, use the *Restore Internet Explorer Advanced Settings* steps in the following chapter titled *Navigation Procedures* to resolve the problem.

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**Internet Explorer** You must have Internet Explorer version 7 or lower.

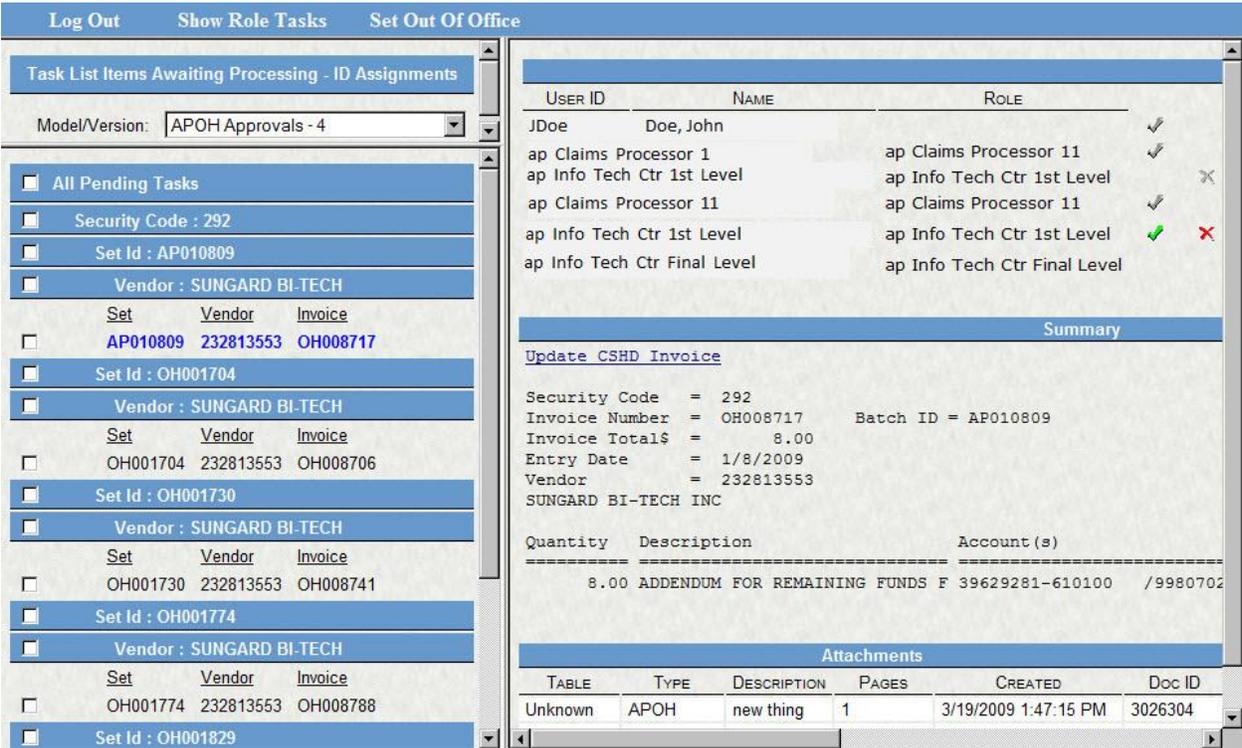
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# Task List Window View

**Introduction** The following information describes the Task List window view and menu options.

**Task list window** The following image shows the Task List window view. This view displays the following features.

- Show Role Tasks and Set Out of Office in the menu bar
- Task List Items Awaiting Processing frame
- Viewing invoices and requisitions by group in the Sidebar



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## Task List Window View, Continued

**Menu bar** The following table describes the options in the Menu bar.

<b>Menu option</b>	<b>Function</b>
Log Out	This option allows you to log out of the IFAS 7i.
Show Role Tasks	This option allows you to toggle between viewing the items by user ID or by approval role in the Sidebar.
Set Out of Office	This option allows you to set the Workflow to send invoices and requisitions to the next approver in your role when you are out of the office.  <b>Note:</b> Remember to change your setting to In-Office when you return to the office.

**Task list items awaiting processing** The Task List Items Awaiting Processing option in the sidebar allows you to choose between a Model/Version of the program depending on the task you need to work.

**Example:** APOH Approvals

**Approve/reject invoices and requisitions** You can approve or reject invoices and requisitions individually or by group by using the following titles.

- AP invoices
  - All Pending Tasks
  - Security Code
  - Set ID
  - Vendor
- PO Requisition
  - All Pending Tasks
  - Vendor
  - User
  - Entry Date

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## Task List Window View, Continued

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**Task list  
window**

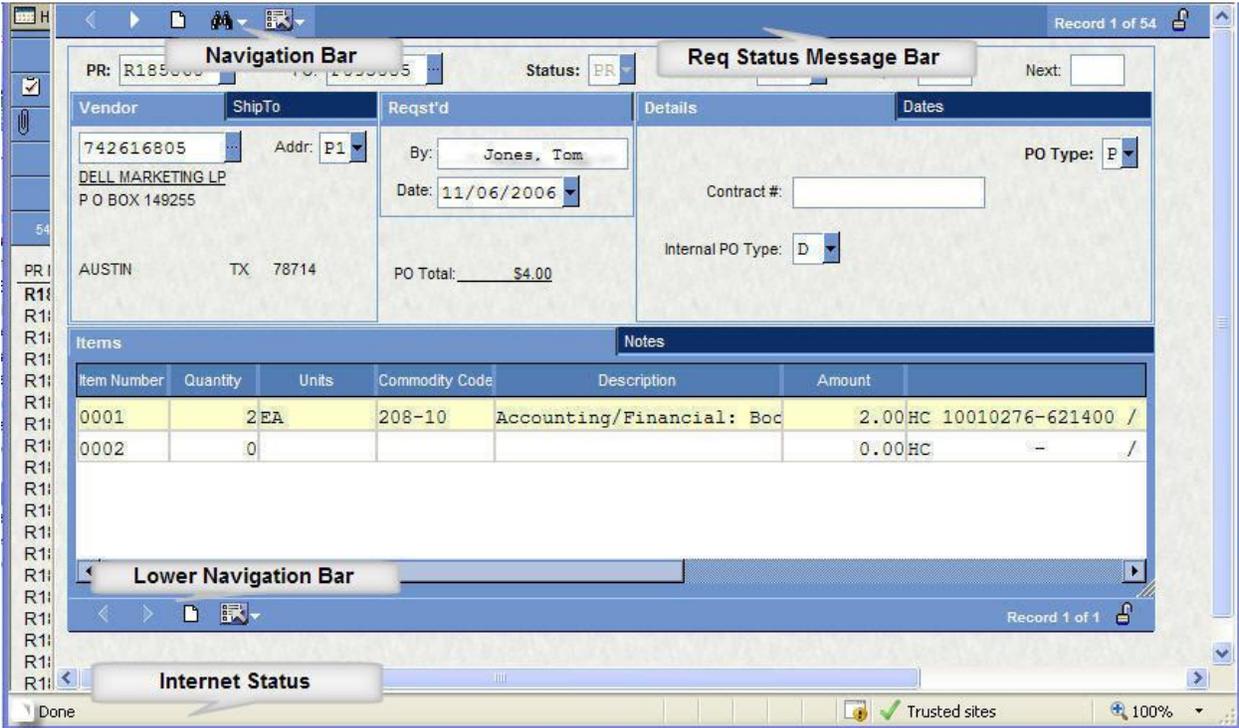
The Task List window shows the history, summary, and attachments of the invoice or requisition.

- History – shows the approval history
  - Summary – shows details
  - Attachments – click the invoice link in the Attachments frame to view an image
-

# IFAS 7i Screen

**Introduction** The following information describes the IFAS 7i screen. The POCSHR screen is used in this section as an example.

**7i screen view** The following image shows the IFAS 7i POCSHR screen that initially opens with the sidebar menu only partially in view. See the section titled *IFAS 7i Sidebar Menu* for the expanded view.

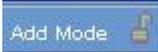


Icon	Function
	The double-arrow circle is a toggle button to expand or contract the view of the sidebar.
	The right and left arrows in the navigation bar allow you to go to the next record or to the previous record.

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## IFAS 7i Screen, Continued

### 7i screen view (continued)

Icon	Function
	The New Record icon in the Navigation bar opens a new record for data entry. Click the New Record icon to change to Browse mode.
	The Binoculars icon indicates the Find/Search menu. The down arrow beside the binoculars indicates a drop-down menu. Click the Binoculars icon to view the drop-down menu.
	The Options icon, with the down arrow, opens a drop-down menu of available functions.
	The program displays the screen mode, e.g., Add or Find, at the far right of the Navigation bar.
	The record count at the far right of the Navigation bar is visible in the Browse mode only and allows you to choose the record you want to view. Click the New Record icon to change to Browse mode.
	The Ellipsis button means that there are menu options you can choose, and you can access the Lookup feature in the drop-down menu.

### IFAS type-ahead box

All the IFAS 7i procedures documented in the following pages show access to the IFAS masks through the IFAS tree. If you already know the mask you want to work on, you can enter the mask name in the type-ahead box, and press Enter. This shortcut takes you directly to the mask you entered.

## The Options Icon

**Introduction** The Options menu allows you to make changes to your view of the record you are working on, the records themselves, and change settings.

**Options drop down menu** The following image shows the Options drop-down menu.



Menu Option	Function
Show Grid	The Show Grid option allows you to toggle between Show Grid and Hide Grid.
Sort Order	The Sort Order option allows you to sort by different criteria.
Undo Changes	The Undo Changes option allows you to undo the last action.
Undo All	The Undo All option allows you to undo all changes since the last save.
Copy Record	The Copy Record option allows you to copy information to the clipboard.
Paste Record	The Paste Record option allows you to paste information to the clipboard.  <b>Note:</b> You must be in the Add mode to use the Paste Record option.
Delete Record	The Delete Record option deletes the record.
Close Window	The Close Window option closes the window.

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## The Options Icon, Continued

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### Options drop down menu (continued)

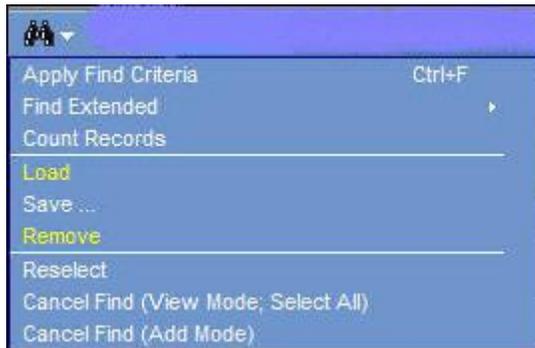
Menu Option	Function
Settings	<p>The Settings option allows you to make changes in the following tabs.</p> <ul style="list-style-type: none"><li>• Ledgers – choose the GL or JL ledger</li><li>• Preferences – choose the <b>Upon Request</b> option from the drop-down menu in the <b>Show Attachments</b> field to view attachments in the Attachments tab in the sidebar</li><li>• Advanced – leave all fields blank</li><li>• Screen Specific – the <b>Task List</b> field should already be set to Enable</li></ul> <p><b>Note:</b> You must leave all other fields in all the tabs blank.</p>
Help	<p>The Help option provides the IFAS 7i version information, and Bi-Tech module documentation.</p>

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## The Binoculars Icon

**Introduction** The Binoculars icon allows you to perform different search and highlight functions.

**Binoculars drop-down menu** The following images show the Binoculars drop-down menu. Some menu options are only visible or available when you are in the Find mode. You can search on any field. Use the asterisk as a wild card.



**Find Mode**



**Add or Browse Mode**

Menu Option	Function
Apply Find Criteria	The Apply Find Criteria option is only available when in the Find mode. The current selection criteria are applied.
Find/Search	The Find/Search option allows you to search for a record or set of records.
Find Extended	This option is not available at this time.
Count Records	The Count Records option shows the number of records currently open.
Load	This option is not available at this time.
Save	This option is not available at this time.
Reselect	Use the Reselect option to return to the most recently loaded Find definition.
Select All	The Select All option allows you to return to the unfiltered database.
Cancel Find (View Mode; Select All)	This Cancel Find option allows you to cancel the find and brings you back to the Browse mode.
Cancel Find (Add Mode)	This Cancel Find option brings you back to the Add mode.

## Lower Navigation Bar

**Introduction** The following information describes the icons in the Lower Navigation bar. The Lower Navigation bar guides you through the lower frame of the web-browser window no matter which IFAS 7i module you are working in.

**Lower Navigation bar** The following image shows the Lower Navigation bar icons and the icon functions.

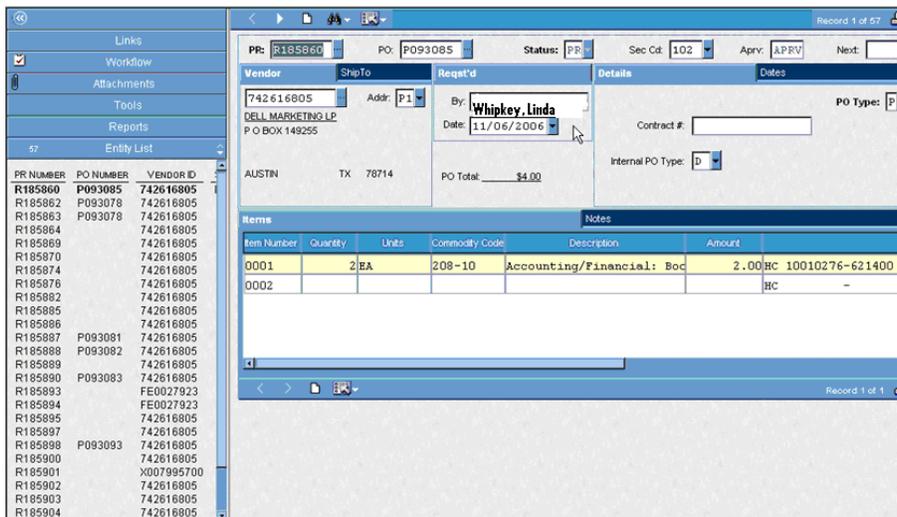


Icon	Function
	The right and left arrows in the Lower Navigation bar allow you to go to the next record or to the previous record.
	The New Record icon in the Lower Navigation bar opens a new record for data entry.
	The Options icon, with the down arrow, opens a drop-down menu of available functions.
	The program displays the screen mode, e.g., Add or Find, at the far right of the Navigation bar.
	The record count at the far right of the Navigation bar is visible in the Browse mode only and allows you to choose the record you want to view.

## IFAS 7i Sidebar

**Introduction** The following information describes the expanded IFAS 7i sidebar.

**7i sidebar menu** The following image shows the sidebar on the left side of the window.



Options	Function
Links	Links on this tab are available on selected screens.
Workflow	The Workflow option allows you to access Workflow information.
Attachments	The Attachments option allows you to view attached files. A lone paperclip icon indicates that there are no attachments. A paperclip with a yellow page icon indicates that attachments are available. You must set up to view attachments in the Settings options located in the Options drop-down menu.
Tools	This option is not available at this time.
Reports	Reports on this tab are available on selected screens.
Entity List	The Entity List tab displays all records. Double-click any number to view the record. The previously viewed records are designated in blue. The current record is bolded.

## IFAS 7i Keyboard Commands

**Introduction** The following information explains each short-cut keyboard command and its function.

**Keyboard commands** The following table describes the short-cut keyboard commands and their functions.

Keyboard Command	Function
CTRL +A	Add a new record button in the web-browser frame in which the cursor is located.
CTRL+D	Delete a record in the web-browser frame in which the cursor is located.
CTRL+F	Toggle the Find mode On and Off.
CTRL+G	Toggle the Grid mode On and Off.
CTRL+L	View the drop-down menu associated with a field with a down arrow.
CTRL+T	Display the next auto-generated seed value for a field.
CTRL+N	Move to the next record in the web-browser frame in which the cursor is located.
CTRL+P	Move to the previous record in the web-browser frame in which the cursor is located.
CTRL+1, 2, 3, 4...	Move to another tab in the window.  <b>Example:</b> If there are four tabs in the web-browser frame in which the cursor is located, press CTRL+3 to move to the third page from the left.
F5	Refresh the screen.
TAB	Move through the fields.
SHIFT+TAB	Move the cursor back through the fields.
SHIFT+CTRL+T	Toggle the debug tracing On and Off.
CTRL +	Zoom out.
CTRL -	Zoom in.

## General Navigation Procedures

### Overview

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**Introduction** The following information contains general procedures for IFAS 7i.

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**In this chapter** This chapter contains the following topics.

<b>Topic</b>	<b>See Page</b>
Restore Internet Explorer Advanced Settings	15
Choose a Record	16
Lookup Feature	17

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## Restore Internet Explorer Advance Settings

**Introduction** The following information explains how to restore Internet Explorer Advanced Settings to resolve the About Blank message when you first use IFAS 7i.

**About blank** If the program stalls when you first open IFAS 7i and the message at the top of the screen says About Blank, use the following steps to resolve the problem.

Step	Action
1	Open the <b>Internet Explorer</b> program. A browser window opens.
2	Click the <b>Tools</b> menu option at the top of the browser window. A drop-down list opens.
3	Click the <b>Internet Options</b> menu option from the drop-down list. The <b>Internet Options</b> window opens.
4	Click the <b>Settings</b> button under the <b>Tabs</b> section in the <b>General</b> tab. The <b>Tabbed Browsing Settings</b> window opens.
5	Click the <b>Restore Defaults</b> button at the bottom left-hand corner, and click the <b>OK</b> button. The <b>Tabbed Browsing Settings</b> window closes.
6	Click the <b>Advanced</b> tab in the <b>Internet Options</b> window. The <b>Advanced</b> tab opens.
7	Click the <b>Restore Advance Settings</b> and the <b>Reset</b> buttons at the lower right side of the window. The <b>Reset Internet Explorer Settings</b> window opens.
8	Click the <b>Reset</b> button at the bottom. The program begins resetting the Internet Explorer settings.
9	Click the <b>Close</b> button when the process is complete. The program opens a message window telling you that you must restart the program for the changes to take effect.
10	Click the <b>OK</b> button in the message window. The window closes.
11	Click the <b>OK</b> button in the <b>Internet Options</b> window to complete the procedure.
12	Restart your computer.

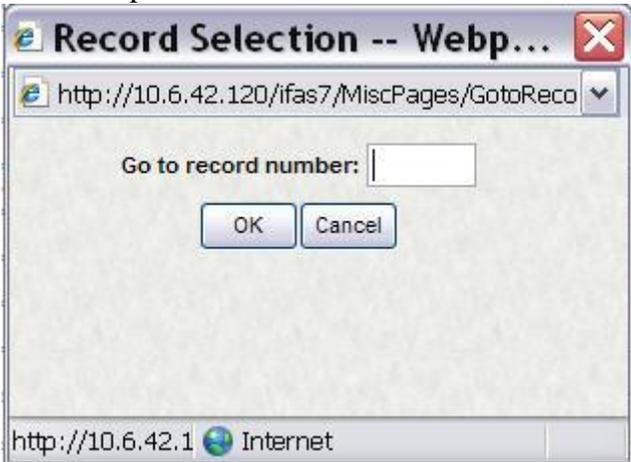
## Choose a Record

**Introduction**

The following information explains how to choose a record using the Record Count button located at the far right of the Navigation bar. You must be in the Browse mode to see the Record Count button.

**Choose a record**

Use the following steps to choose a record using the Record Count button. You must be in the Browse mode to see the Record Count button.

Step	Action
1	<p>Click the <b>Record Count</b> button to choose a record. The following window opens.</p> 
2	<p>Enter the record number you want to view in the <b>Go to record number:</b> field.</p>
3	<p>Click the <b>OK</b> button. The record opens.</p>

## Lookup Feature

### Introduction

The following information explains how to use the IFAS 7i Lookup feature. The following example shows the Lookup feature used to search for a vendor, but you can also search for a name or a PEID number.

### Key-Object field lookups

The Lookup feature is also available for Key-Object field lookups.

- Click the Key-Object field sub-field that you want to search.
- Click the Ellipsis button at the far right side of the Key-Object field to open the drop-down menu. The drop-down menu displays the Lookup option specifically for the sub-field in which your cursor is located.
- Click the Lookup option to access the Data Lookup window.

### Use Lookup

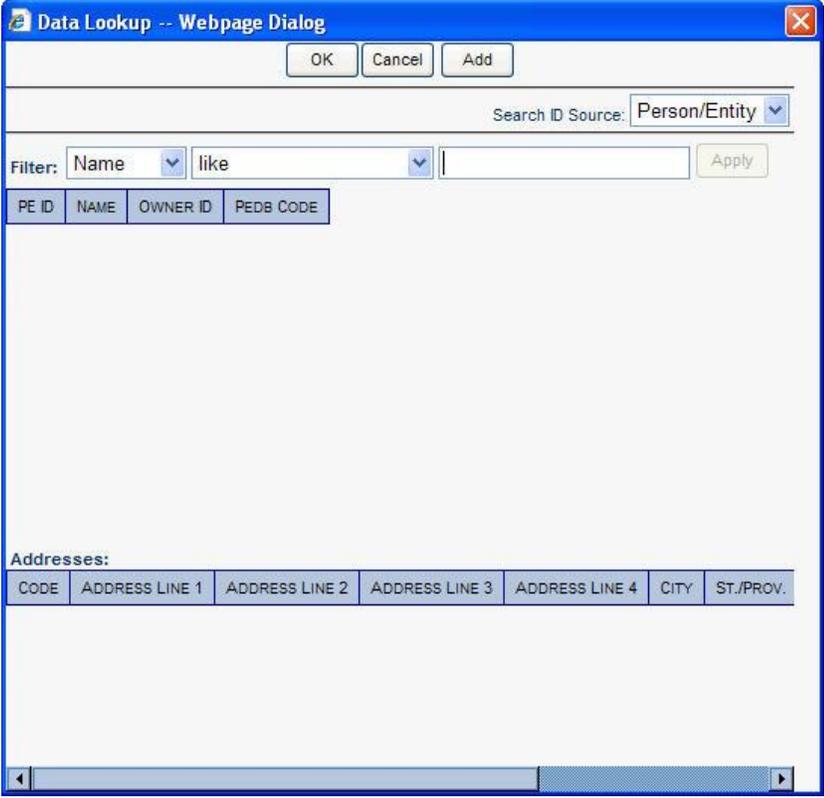
Use the following steps to use the Lookup feature.

Step	Action
1	<p>Click the <b>Ellipsis</b> button beside the field with this option. A drop-down list opens.</p> 

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# Lookup Feature, Continued

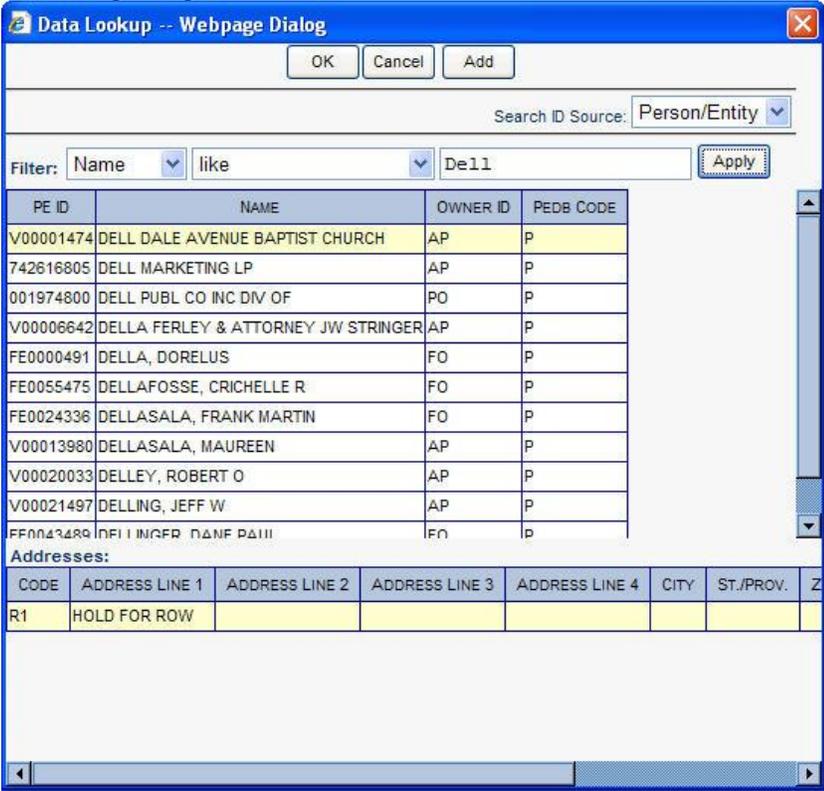
## Use Lookup (continued)

Step	Action
2	<p>Click the <b>Lookup</b> option. The following <b>Data Lookup</b> window opens.</p> 

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**Lookup Feature, Continued**

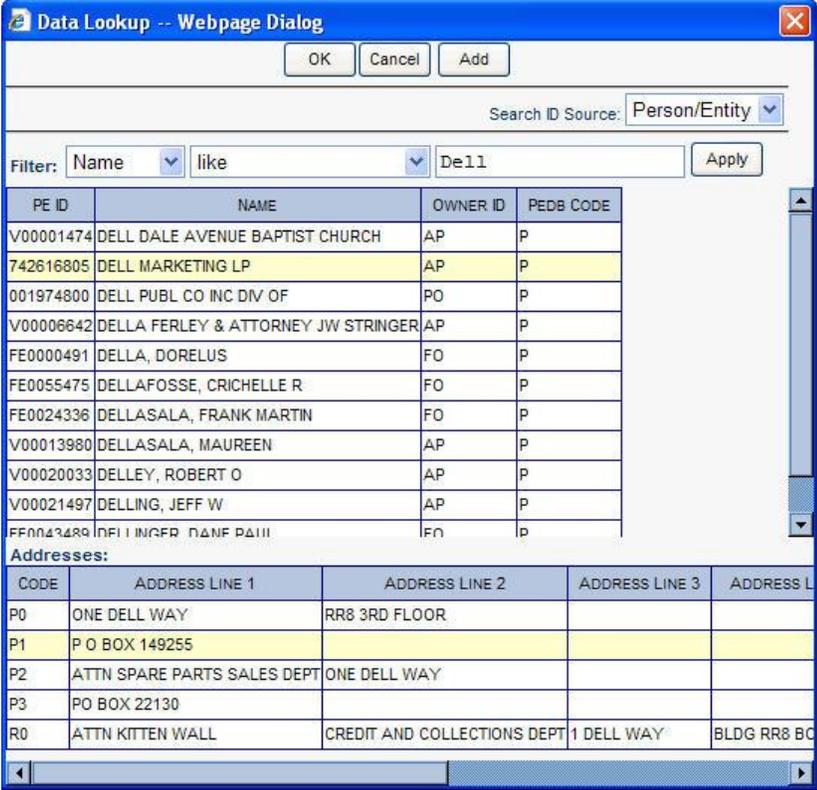
**Use Lookup (continued)**

Step	Action
3	<p>Choose the filter options from the two drop-down lists, enter a name or number in the search-value field, and click the <b>Apply</b> button or press <b>Enter</b>. A list of options appears as shown in the following image.</p>  <p><b>Note:</b> The search value field could be case sensitive.</p> <p><b>Note:</b> You can place an asterisk before the search value to view all records that contain the search word within the name.</p>

*Continued on next page*

# Lookup Feature, Continued

## Use Lookup (continued)

Step	Action
4	<p>Highlight a name. An address or list of addresses appears at the bottom as shown in the following image.</p>  <p><b>Note:</b> When creating a purchase order requisition, always choose an address that contains a <b>P</b> in the <b>Code</b> column.</p>
5	<p>Highlight the address you want to use, and click the <b>OK</b> button at the top of the <b>Data Lookup</b> window or double-click the address. The <b>Data Lookup</b> window closes, and the program displays the address in the <b>Vendor</b> tab of the requisition screen.</p>