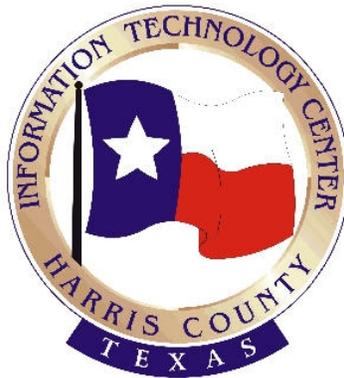


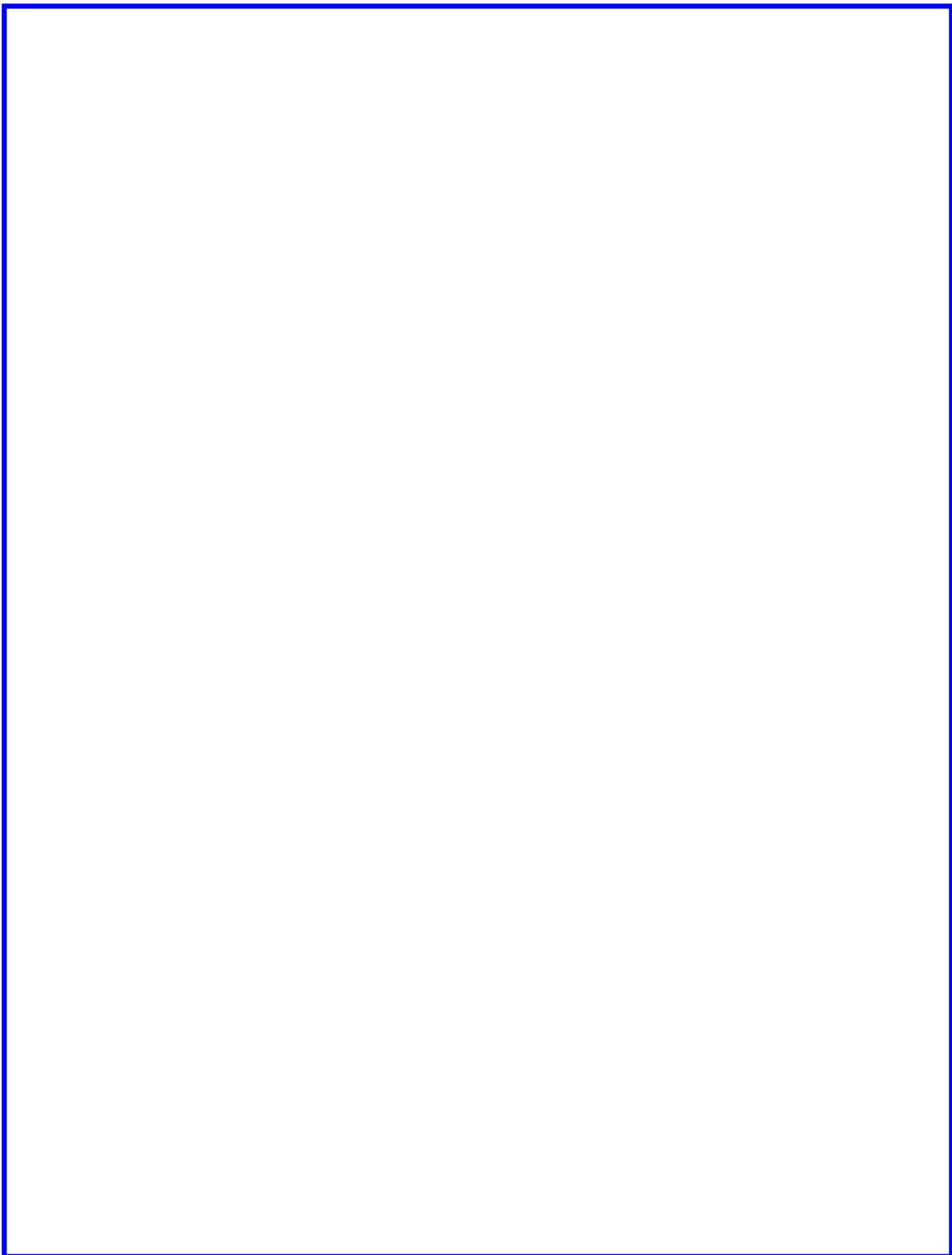
# IFAS 101



Information Technology Center  
Education and Career Development Division

Participant's Manual

Rev 4 January, 2011



# Table of Contents

<b><i>Participant's Manual</i></b> .....	<b>4</b>
General Overview .....	4
Structure of the Participant's Manual.....	5
<b><i>Part 1: Introductions and Logging On</i></b> .....	<b>6</b>
Overview .....	6
The Function and Components of IFAS.....	7
Insight .....	8
IFAS Logon.....	9
Changing Your Password.....	15
Navigation in Insight.....	17
IFAS 101: REVIEW 1 .....	21
<b><i>Part 2: Using IFAS</i></b> .....	<b>24</b>
Overview.....	24
Account Coding .....	25
The 7i Screen .....	26
Creating a Record in the 7i Screen.....	29
Updating a Record in the 7i Screen.....	34
The Triad Screen .....	37
Creating a Record in the Triad Screen .....	39
Updating a Record in the TRIAD Screen.....	44
IFAS Classic Screen.....	48
Creating a Record in the Classic Screen .....	50
Updating a Record in a Classic Screen .....	51
Settings.....	55
IFAS 101: REVIEW 2 .....	56
<b><i>Glossary</i></b> .....	<b>59</b>

# Participant's Manual

## General Overview

---

**Introduction** This class includes explanations and activities designed to teach important introductory IFAS topics. Please feel free to ask questions at any time.

---

**Goals** The following are the goals for today:

- To log on to IFAS
- To use basic navigation methods
- To navigate through modules of IFAS

Use this manual for reference and completing exercises.

---

# Structure of the Participant's Manual

---

## **Introduction**

Each part of the manual contains objectives that explain what you should be able to do at the completion of the section.

---

## **Contents**

There are procedures, diagrams, tables or graphics, and review questions in this manual. Please feel free to write notes or highlight important sections on the copy you printed at your office.

A Glossary is provided. Refer to the words during the class and at your desk, as needed.

---

# Part 1: Introductions and Logging On

## Overview

---

### Objectives

The following objectives are covered in this section:

- Define IFAS and its function.
  - Describe Insight and how it relates to IFAS.
  - Complete Insight logon procedures.
  - Describe procedures used for changing an IFAS password and tell why it would be necessary to do so.
- 

### Contents of Part 1

This part of the manual contains the following topics.

Topic	See Page
The Function and Components of IFAS	7
Insight	8
IFAS Logon	9
Changing Your Password	15
Navigation in Insight	17
IFAS 101: Review 1	21

---

# The Function and Components of IFAS

---

**Introduction** IFAS is the software Harris County uses for its financial and administrative functions. The acronym stands for Integrated Financial Administrative Solution.

---

**Modules** IFAS is software that has been divided into large modules, similar to sections, to address the financial and human resource functions of the County. These modules include Purchasing, Budget, Payroll, Human Resources, and others. Proper security clearance is required to access each of these functions and should be obtained prior to your use of the IFAS system.

The information that you enter into the system can be used to generate reports for your department. This information ranges from adding new employees to recording tax receipts.

---

**Tasks/  
Functions** Your work in an IFAS module is broken into masks and screens/tasks. You may need to enter data into several screens in order to complete a particular IFAS process.

---

# Insight

---

**Introduction** To carry out your responsibilities, you need to know the IFAS system and how to navigate it. The first part of this navigation is Insight.

---

**Point and Click** The Insight Explorer View is the first screen you see after logging into the system. Insight allows you to use the Windows® standard method of navigating; that is, clicking on icons and/or typing in names. These actions will take you into the system functions.

---

# IFAS Logon

**Introduction** You will use a regular logon procedure unless you want to go into a different database or you have to change your password.

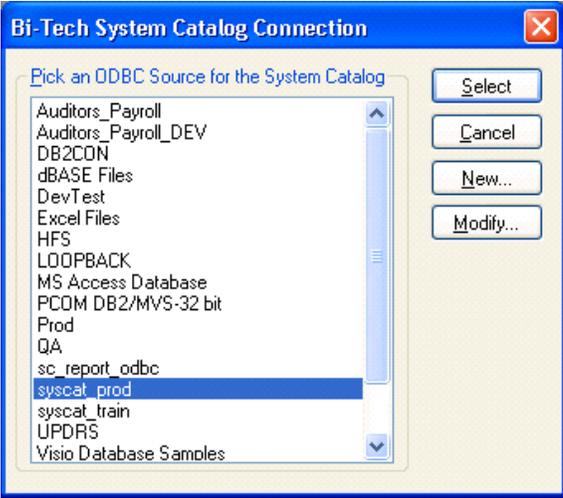
**Logging on** Follow these steps for a regular logon.

Step	Action
1	Click on the <b>Start</b> menu at the bottom left of your screen.
2	Click on <b>Insight</b> on the <b>Start</b> Menu. You may also double-click on the icon on the desktop, if it is present. 

*Continued on next page*

## IFAS Logon, Continued

### Logging on (continued)

Step	Action
3	<p>Choose the Production connection (prod) by highlighting it in the Bi-Tech System Catalog Connection dialog box. Click <b>Select</b>.</p>  <p><b>Note:</b> For training purposes, the “train” database is used.</p>
4	<p>Ensure that your user name displays correctly in the Login ID field of the OpenLink ODBC Login dialog box and <b>prod</b> is the data source.</p> 

*Continued on next page*

## IFAS Logon, Continued

---

### Logging on (continued)

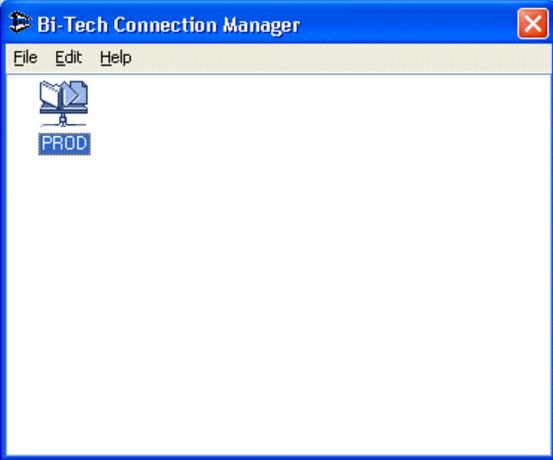
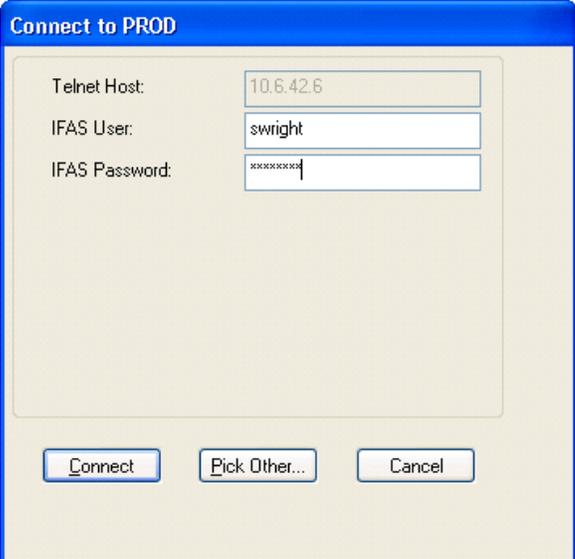
Step	Action
5	a. If the user name is correct, tab to the IFAS Password field. b. If the user name is not correct, type the correct one in the field. Tab to the password field.
6	Type your current IFAS Password in the password field. <ul style="list-style-type: none"><li>• Passwords must be at least six characters in length but not longer than eight characters total.</li><li>• Passwords must have at least two non-alpha characters.</li><li>• Passwords can only have a maximum of three characters that repeat.</li></ul> <p><b>Note:</b> Passwords are case sensitive.</p>
7	Press <b>Enter</b> or click the <b>OK</b> button.

---

*Continued on next page*

## IFAS Logon, Continued

### Logging on (continued)

Step	Action
8	<p>Choose the Production icon by double-clicking it in the Bi-Tech Connection Manager dialog box.</p> 
9	<p>Ensure that the User name is correct in the Connect to PROD dialog box.</p> 

*Continued on next page*

## IFAS Logon, Continued

---

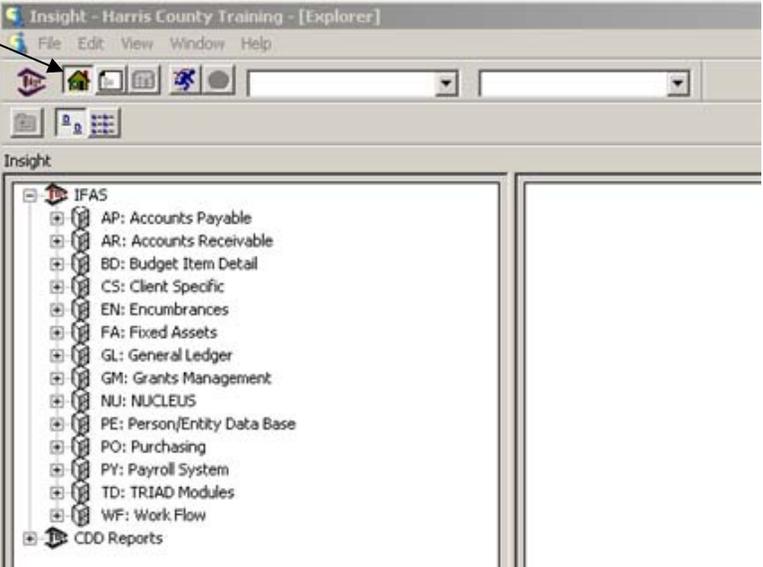
### Logging on (continued)

Step	Action
10	a. If the user name is correct, tab to the IFAS Password field. b. If the user name is not correct, type the correct one in the field. Tab to the password field.
11	Type your current IFAS Password in the password field. <ul style="list-style-type: none"><li>• Passwords must be at least six characters in length but not longer than eight characters total.</li><li>• Passwords must have at least two non-alpha characters.</li><li>• Passwords can only have a maximum of three characters that repeat.</li></ul> <p><b>Note:</b> Passwords are case sensitive.</p>
12	Click <b>Connect</b> .

*Continued on next page*

## IFAS Logon, Continued

Logging on  
(continued)

Step	Action
13	<p>The Explorer view displays with the IFAS menu tree. If it does not appear and the screen is blank, click the “house” button in the menu bar and the Explorer view will display.</p> 

House Icon

# Changing Your Password

---

**Introduction** The following section gives you information about your password.

---

**Changing your password** You are required to change your IFAS password once every 60 days. If you fail to change your password at least once within this period, your password will expire and you will be prompted to change it before you can log back into the IFAS system.

---

**“Change IFAS Password” Procedure** Do not share your password. Any work done under your password is your responsibility. The procedure for changing a password follows.

Step	Action
1	<p>Double-click the “Change IFAS Password” icon  on your desktop.</p> <p>The following screen displays:</p> 

**Note:** If you do not have the icon, e-mail the Harris County Help Desk [ITCHelpDesk@hctx.net](mailto:ITCHelpDesk@hctx.net) to obtain it.

---

*Continued on next page*

## Changing Your Password, Continued

---

### “Change IFAS Password” Procedure (continued)

Step	Action
2	Type your user ID after “login.”
3	Type your old password when prompted.
4	When prompted, “Do you want to change your password,” type <b>y</b> and press <b>Enter</b> .  <b>All passwords must conform to the IFAS password guidelines listed on page 11.</b>
5	Type in the old password at the password prompt. Press <b>Enter</b> .
6	Type in the new password at the new password prompt. Press <b>Enter</b> .
7	Confirm the new password by typing it again. Press <b>Enter</b> .
8	A question will ask you, “Do you want to change your password?” This time type <b>n</b> for no. Press <b>Enter</b> .
9	A message displays saying “Host Lost.”
10	Exit by clicking on <b>X</b> in the upper right corner.

### Disabled (locked out) IFAS User

Your IFAS User account can be disabled or locked out if you attempt three or more logons using an incorrect or expired password. In the event your User account is locked, contact the Harris County Help Desk at [ITCHelpdesk@hctx.net](mailto:ITCHelpdesk@hctx.net) and request to have your User account unlocked.

---

### System Prompt for Password Change

When the system prompts you to change your password, the change you make will affect *only* your *current* session. If you receive a system prompt, use the “Change IFAS Password” icon to change your password for all new sessions.

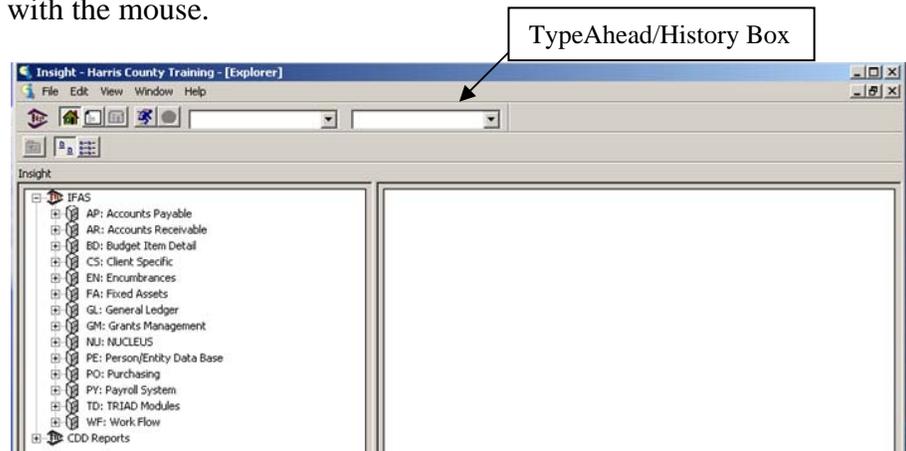
---

# Navigation in Insight

**Introduction** The following section defines how to navigate in Insight in order to get to the IFAS process you wish to perform. There are two views in IFAS: Explorer and Output.

---

**Explorer View** The Explorer view displays a Menu Tree from which you select a module, process and screen. In the Explorer view, open or expand the tree by clicking the plus sign (+) that precedes modules and processes. Then, navigate to the screen or tasks you wish to perform by selecting with the mouse.



There are three ways to get to the screen you need:

- 1) through the Menu tree by clicking on the plus sign (+) that precedes the module names and double clicking on the screen/task name
- 2) by entering a mask in the TypeAhead/History Box, and pressing Enter. A mask is a grouping of letters in sets of two that precede the tree items. A mask will have a minimum of four characters.
- 3) by clicking on the arrow within the TypeAhead/History Box and selecting from the listing of previously used masks

**Note:** Clicking on a minus sign (-) will close or “collapse” a level in the directory tree.

---

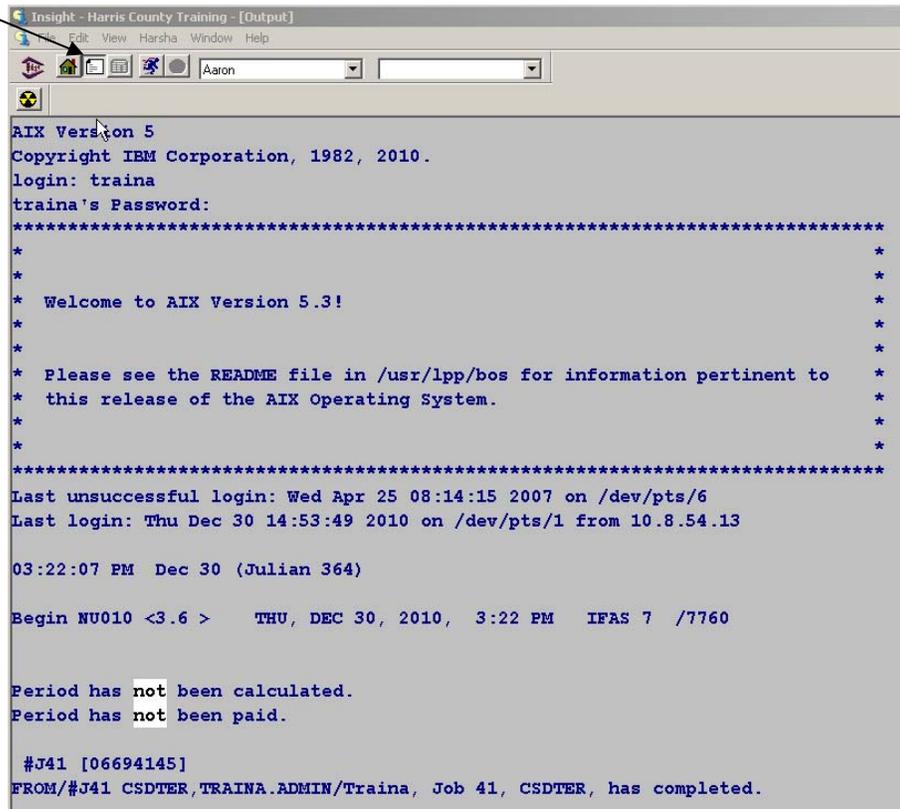
*Continued on next page*

## Navigation in Insight, Continued

### Output View

There is a second view called the Output view, seen below. Go to it by clicking the View Output icon  in the menu bar. The Output view gives general information and a recent “history” of activity in the system; for example, how long a module has been opened or if a report has successfully been created. The figure below shows that the process/task was completed.

View  
Output Icon



```
Insight - Harris County Training - [Output]
File Edit View Harsha Window Help
Aaron
AIX Version 5
Copyright IBM Corporation, 1982, 2010.
login: traina
traina's Password:
*****
*
*
* Welcome to AIX Version 5.3!
*
*
* Please see the README file in /usr/lpp/bos for information pertinent to
* this release of the AIX Operating System.
*
*
*****
Last unsuccessful login: Wed Apr 25 08:14:15 2007 on /dev/pts/6
Last login: Thu Dec 30 14:53:49 2010 on /dev/pts/1 from 10.8.54.13

03:22:07 PM Dec 30 (Julian 364)

Begin NU010 <3.6 > THU, DEC 30, 2010, 3:22 PM IFAS 7 /7760

Period has not been calculated.
Period has not been paid.

#J41 [06694145]
FROM/#J41 CSDTER,TRAINA.ADMIN/Traina, Job 41, CSDTER, has completed.
```

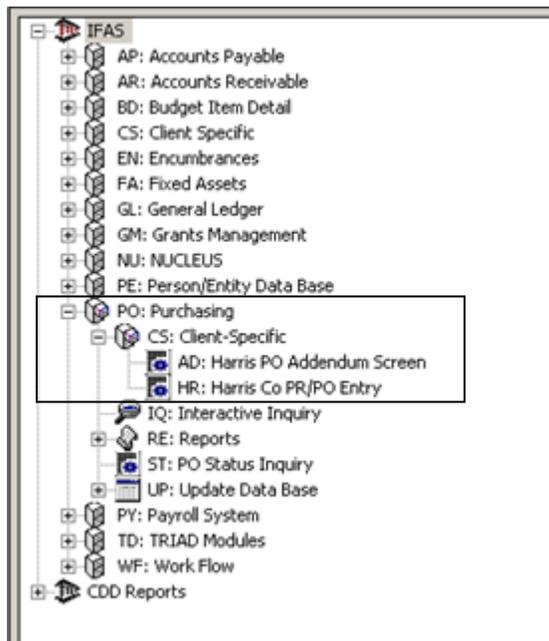
*Continued on next page*

## Navigation in Insight, Continued

---

### Navigating with The Menu Tree - Explorer View

To get to a task by using the Menu tree, simply click on the plus sign (+) that precedes the name of a module. Then, select the process/task by double-clicking on it. In the figure below, the *PO Purchasing* module is opened, *CS Client Specific* is opened, and two functions are available, *AD:Harris PO Addendum Screen* and *HR:Harris Co PR/PO Entry*. Double-clicking on a function takes you directly to the IFAS screen to begin work.



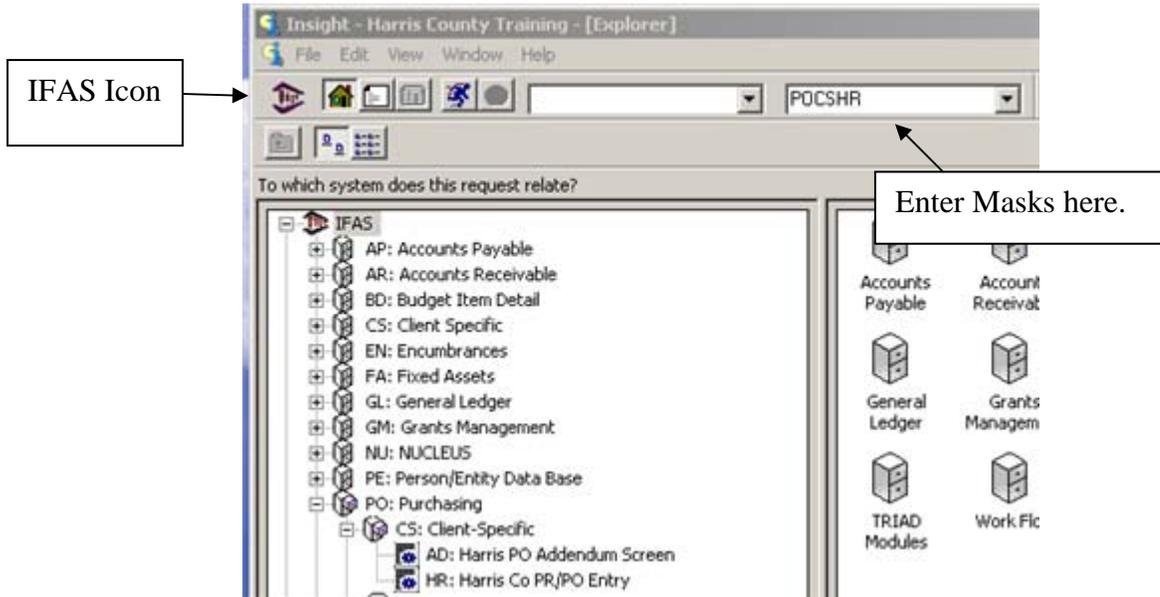
The above tree leads to the masks, POCSAD and POCSHR.

*Continued on the next page*

## Navigation in Insight, Continued

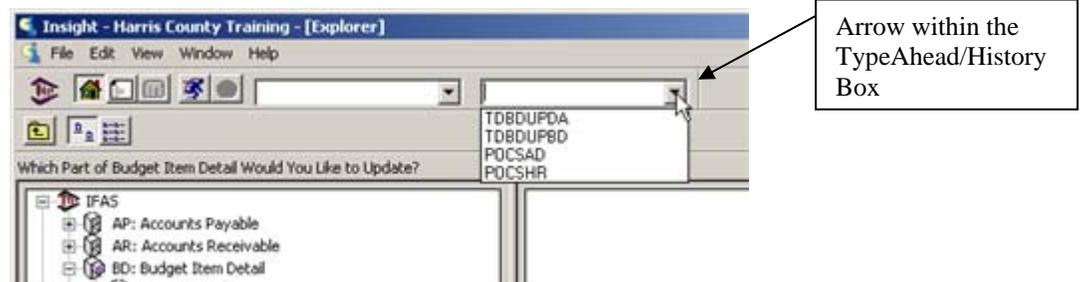
### Masks

If you wanted to type a mask for the previous process, enter **POCSAD** for the Addendum screen or **POCSHR** for the PR/PO Entry screen in the TypeAhead/History Box.



### Arrow

To choose from a list of previously used masks, click on the arrow within the TypeAhead/History Box and click the mask you need.



### IFAS Icon

Just as Microsoft has an hourglass that appears while it is busy, in IFAS, a spinning icon  displays while it is working. The icon is an abacus. It spins when the system is busy retrieving or storing data. Find it in the upper left corner, below the menu bar.

# IFAS 101: REVIEW 1

---

## Introduction

Write the answer to these review questions in the space provided.

---

## Passwords

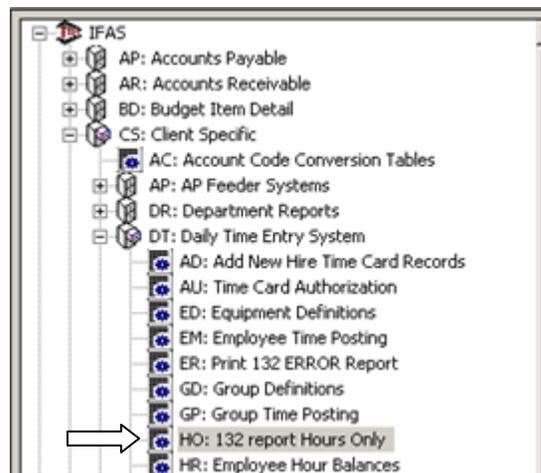
1. When you enter your password, why is it important to make sure that your CAPS LOCK is disabled?
  
  2. What is the minimum and maximum character length for an IFAS password?
  
  3. Why should you never share your password?
  
  4. When do you *have* to change your password?
-

## IFAS 101: REVIEW 1, Continued

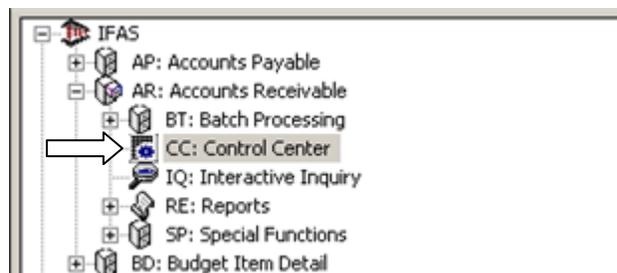
---

### Insight Navigation

5. What are the three ways to access the desired IFAS screen?
6. What is a mask?
7. What happens when you click the plus sign (+) that appears to the left of a module icon? The minus sign (-)?
8. What does it mean when the IFAS logo spins?
9. Give the mask of the following:



10. Give the mask of the following:



---

*Continued on the next page*

## IFAS 101: REVIEW 1, Continued

### Answers

---

**Answers:**  
**Passwords**

1. The Caps Lock must be disabled because both the password and the user ID are case sensitive.
  2. The password must be between six and eight characters in length; it must have at least two non-alpha characters; and, it has a maximum of three characters that repeat.
  3. Never share your password because anything done using your ID and password will be your responsibility.
  4. You change your password before 60 days has passed.
- 

**Answers:**  
**Insight**  
**Navigation**

5. The three ways to access the IFAS screen are:
    - a. choose the module by using the Explorer view menu tree.
    - b. type the mask in the TypeAhead/History Box.
    - c. choose the mask from the previously used listing from the arrow within the TypeAhead/History Box.
  6. A mask is a grouping of letters in sets of two. The sets precede tree items. A mask will have a minimum of four characters.  
**Note: A mask can also be used to invoke a Standard Report.**
  7. When you click the plus sign (+) before a module or sub-module/process, the item is expanded to expose additional sub-modules or tasks/screens.
  8. When the IFAS logo spins, the system is busy.
  9. CSDTHO
  10. ARCC
-

## Part 2: Using IFAS

### Overview

---

**Introduction** There are three different IFAS *screen platforms* that you may use in the IFAS system; these are **7i, Triad and Classic**. You enter data for each type of screen.

---

**Objectives** The following are objectives covered in this section:

- Identify the functions of account coding.
  - Describe the layout of the typical 7i screen.
  - Follow procedures to create a record in a 7i screen.
  - Follow procedures to update a record in a 7i screen.
  - Describe the use of the navigation bar for the Triad screen.
  - Follow procedures to create a record in a Triad screen.
  - Follow procedures to update a record in a Triad screen.
  - Describe the use of the navigation bar in the Classic screen.
  - Follow procedures to create a record in the Classic screen.
  - Follow procedures to update a record in the Classic screen.
  - Describe how to set a default ledger.
- 

**Contents of Part 2**

This part contains the following topics.

Topic	See Page
Account Coding	25
The 7i Screen	26
Creating a Record in the 7i screen	29
Updating a Record in the 7i screen	34
The Triad Screen	37
Creating a Record in the Triad screen	39
Updating a Record in the Triad screen	44
The Classic screen	48
Creating a Record in the Classic screen	50
Updating a Record in the Classic screen	51
Settings	55
IFAS Review 2	56

---

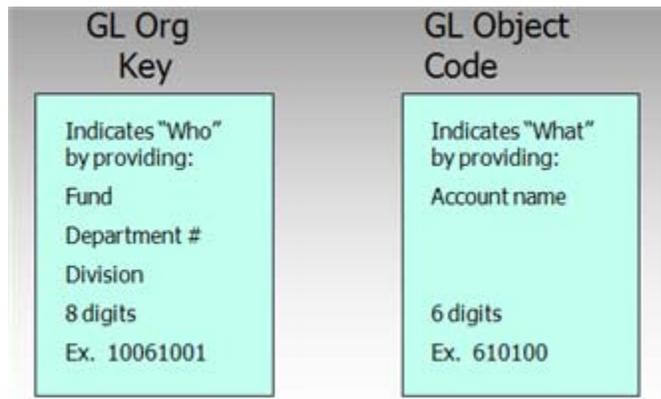
# Account Coding

---

**Using Account Codes: GL**

In creating records, you will often need to enter Account coding. This is composed of GL and JL identifications. It is important that these codes are entered correctly. Refer to your internal departmental documentation or your supervisor for these numbers.

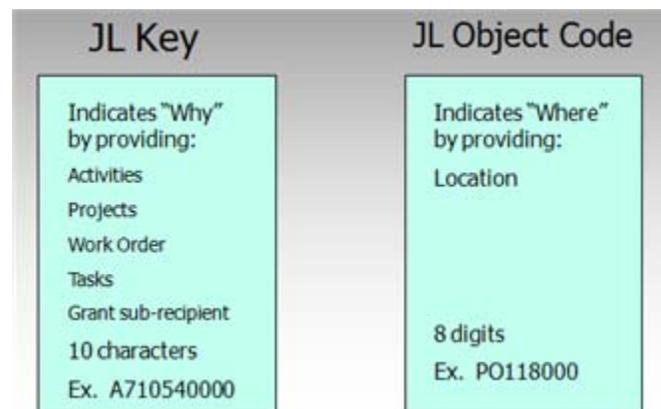
The following figure gives you the criteria for a GL Org Key and an Object Code.



---

**Using Account Codes: JL**

The following figure gives you criteria for the JL Key and the JL Object Code.



# The 7i Screen

## Introduction

This section of the manual outlines features of the 7i screens.

## Definition of the 7i screen

In IFAS, for a number of modules, the appearance of the software on the screen has been updated to look more like a Web application and it is called 7i.

With 7i, you can tab and “mouse” over fields; 7i is arranged to be more informative and easier to navigate.

## Example 7i screen

In the future, 7i will be expanded to all IFAS modules. Presently, 7i has been incorporated into a number of IFAS modules. Examine the figure below. It is from the Purchasing module. Note the following:

- Sidebar
- Menu bar
- Tabs
- Data fields

The screenshot shows the IFAS 7i interface for a Purchasing module. On the left is a sidebar containing a list of PR and PO numbers. The main area is a form with fields for Vendor (Z000999974), ShipTo, Reqs't'd (By: Req Training 5 f), Date (05/07/2007), and PO Total (\$38.00). Below the form is a table with columns: Item Number, Quantity, Units, Amount, Extended Amount, Description, and KEY-OBJECT. The table contains three rows of data. Callout boxes identify the 'Sidebar', 'Menu Bar', 'Tabs', and 'Data Fields'.

Item Number	Quantity	Units	Amount	Extended Amount	Description	KEY-OBJECT
0001	1	EA	12.00	12.00	item 1	10031201-610100 / A330000000-831A000
0002	2	EA	13.00	26.00	hello	10030101-610100 / A910000000-850B000
0003	0		0.00	0.00		- / -

**Note:** Check [www.justifas.net](http://www.justifas.net) for browser compatibility settings

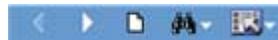
*Continued on next page*

## The 7i Screen, Continued

---

**Characteristics** On the 7i screen, you will see a number of common characteristics.

- Drop down arrows and ellipses (three dots ). These are next to data fields and they open up options.
- Tabs. These group information. Information can include details about the transaction, free form notes about the transaction and recorded data.
- Sidebar. This contains links to special areas.
- Menu bar. There are two menu bars. One is at the top of the screen and one is at the bottom of the screen. Arrows on the menu bar allow you to page through records. You can start a new record by using the blank page icon. There is also a binoculars icon that is used for searches. Other options are available with the Options icon.



The function keys (F#) are not used in the 7i screen. Navigation is mouse-driven.

---

### Navigation Guide

The navigation in a 7i screen is documented for your reference in [www.justifas.net](http://www.justifas.net). To find this document, follow these procedures.

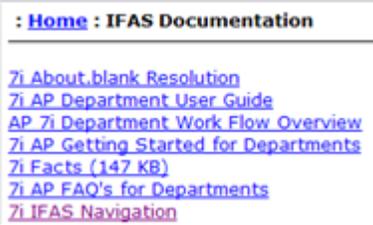
Step	Action
1	Open your web browser.
2	Type <b>www.justifas.net</b> in the address field.
3	Press <b>Enter</b> .

---

*Continued on next page*

## The 7i Screen, Continued

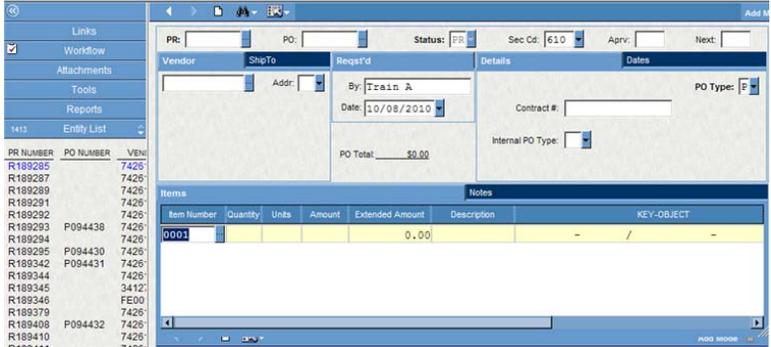
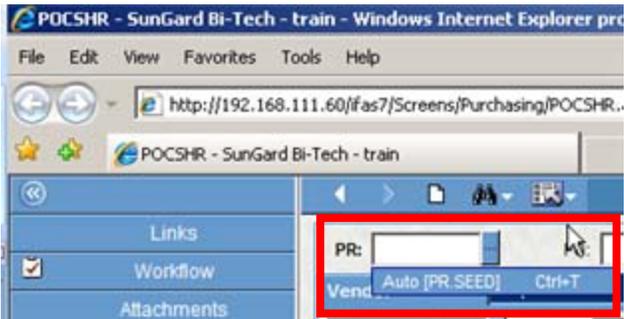
### Navigation Guide (continued)

Step	Action
4	<p>Select <i>IFAS Documentation</i> under the General Information heading.</p>  <p>The screenshot shows a list of links under the heading "General Information". The links are: About ITC-FHRA, About IFAS, CDD4u (with a "New!" badge), CDD Reports, Fast Tracks, FAQ's, IFAS Documentation (highlighted with a white arrow), IFAS Forms, IFAS Training, ITC Help Desk 713-755-6624, FHRA Road Map, and 7i Deployment By Module.</p>
5	<p>Select 7i IFAS Navigation. The file opens.</p>  <p>The screenshot shows a page titled ": Home : IFAS Documentation". Below the title is a list of links: 7i About.blank Resolution, 7i AP Department User Guide, AP 7i Department Work Flow Overview, 7i AP Getting Started for Departments, 7i Facts (147 KB), 7i AP FAQ's for Departments, and 7i IFAS Navigation (highlighted with a white arrow).</p>

# Creating a Record in the 7i Screen

## Practice 7i

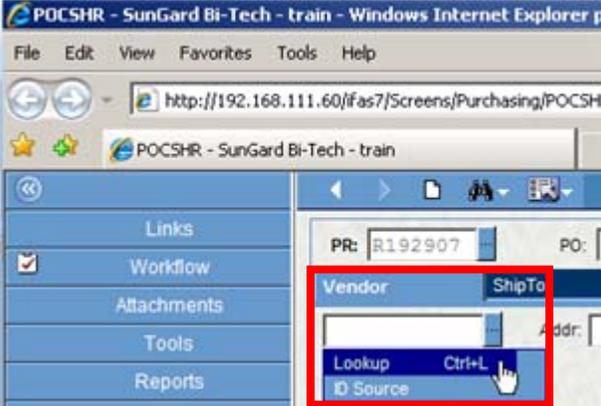
Follow these procedures to create a requisition.

Step	Action
1	Select <b>POCSHR</b> in the Insight Explorer view. Or, type this mask in the TypeAhead/History box. Press <b>Enter</b> .
2	Click the Add icon  in the toolbar.
3	<p>A new screen displays.</p> 
4	<p>Click the ellipsis  next to the PR field to have the system assign a requisition number. In the drop-down list, choose <b>Auto (PR seed)</b>.</p> 

*Continued on next page*

## Creating a Record in the 7i Screen, Continued

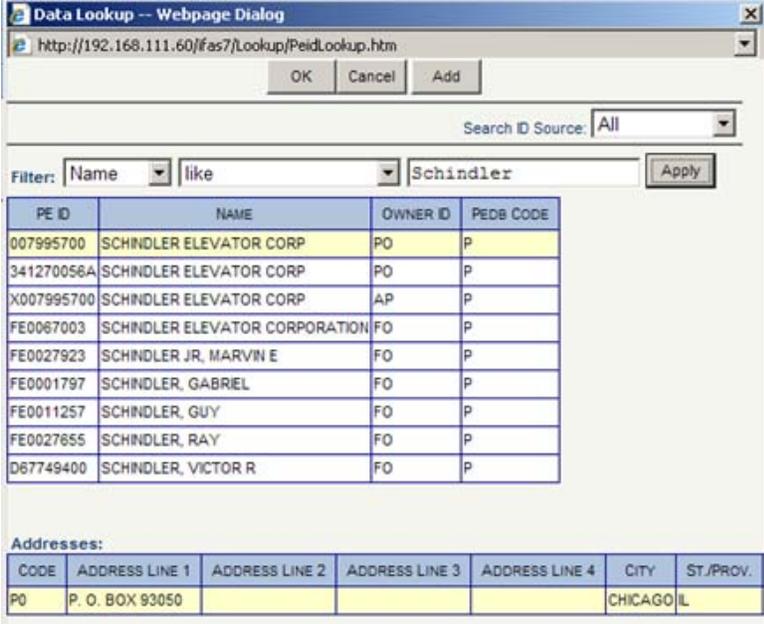
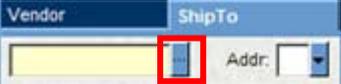
### Practice 7i (continued)

Step	Action
5	<p>Complete the Vendor number by clicking the ellipsis. Select <b>Lookup</b> from the drop-down box.</p> 
6	<p>On the Data Lookup dialog box, enter a search term to complete the filter statement. It could be a name or a PEID (a number that identifies a vendor.)</p> 
7	<p>Press <b>Apply</b> or press <b>Enter</b> to get a listing.</p>

*Continued on next page*

# Creating a Record in the 7i Screen, Continued

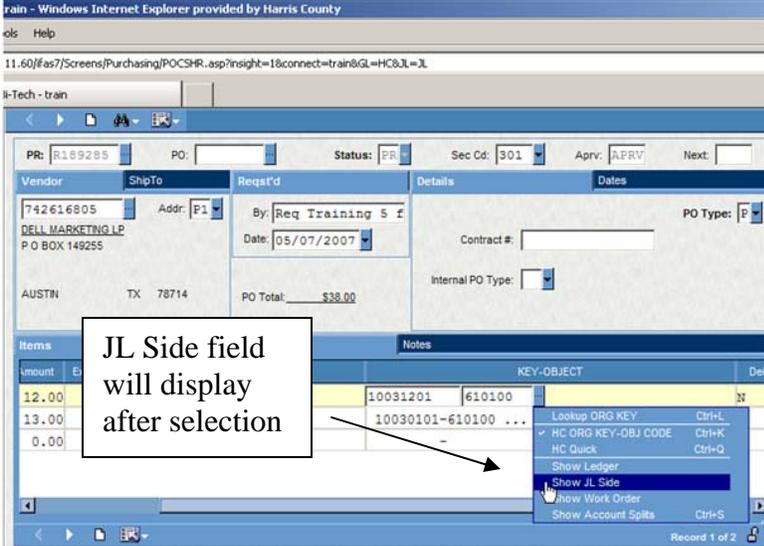
## Practice 7i (continued)

Step	Action
8	<p>Highlight and choose the vendor with PO as the Owner ID and click <b>OK</b>.</p> 
9	<p>Click the <b>Ship to</b>  tab.</p>
10	<p>Click the ellipsis.</p> 
11	<p>Complete a lookup as was done for the Vendor identification.</p>

*Continued on next page*

# Creating a Record in the 7i Screen, Continued

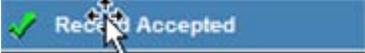
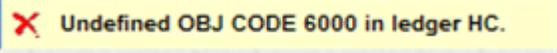
## Practice 7i (continued)

Step	Action
12	<p>Go to the Items section of the screen. Enter account coding. Complete the following fields as directed.</p> <ul style="list-style-type: none"> <li>• Quantity</li> <li>• Units</li> <li>• Amount (price)</li> <li>• Description of the item</li> <li>• Org Key and Object code (account coding)</li> </ul> <p><b>Note:</b> If the JL coding is not shown, click the ellipsis to display a menu.</p>  <p>Click <b>“Show JL Side.”</b> This item will appear with a checkmark, indicating that the JL coding field is displayed.</p>  <p>JL Side field will display after selection</p>
13	Press <b>Enter</b> .

Continued on next page

## Creating a Record in the 7i Screen, Continued

### Practice 7i (continued)

Step	Action
14	<p>If there are yellow dots with precautionary messages that appear in the toolbar at the top of the screen, read the message and take appropriate action. These precautionary messages may contain valuable information about your transaction.</p>  <p>Press <b>Enter</b> again if you wish to continue. Observe the <b>Record Accepted</b> checkmark in the toolbar, indicating that the record has been saved.</p> 
15	<p>If errors occur, one or more red X's appear in the toolbar at the top of the screen. Correct these errors as directed in the error message. When correct, press <b>Enter</b> again to save the record. If you cannot correct an error, press the <b>Escape</b> key to clear the screen. The transaction with the error will not be saved. Observe the example error below.</p> 

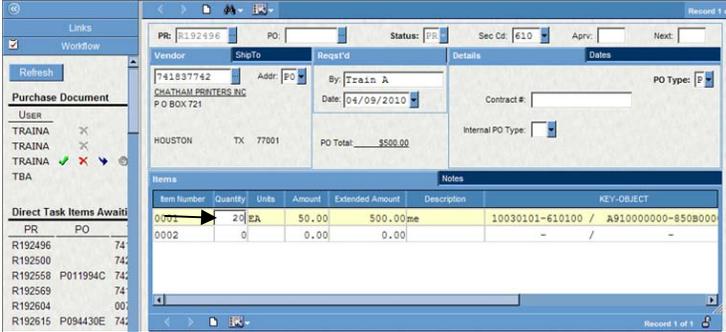
# Updating a Record in the 7i Screen

## Introduction

This section of the manual outlines updating a 7i screen.

## Updating a Record: Practice POCSHR

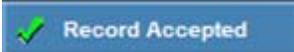
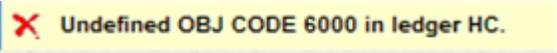
To update a record in a 7i screen, follow these instructions.

Step	Action
1	Double-click <b>POCSHR</b> in the Insight Explorer view. Or, type the mask in the TypeAhead/History box and press <b>Enter</b> .
2	Select a record from the Entity list in the sidebar by clicking the mouse. The record displays.
3	Place the mouse cursor in the field that you will be editing.
4	Type the correct data.  
5	Press <b>Enter</b> to save.

*Continued on next page*

## Updating a Record in the 7i Screen, Continued

**Updating a Record:  
Practice POCsHR  
(continued)**

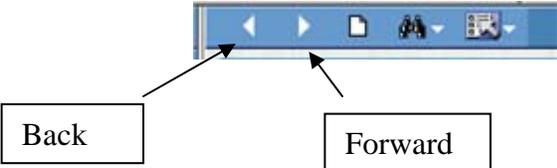
Step	Action
6	<p>For updating a record, enter the data in the appropriate fields. Press <b>Enter</b>. If there are yellow dots with precautionary messages that appear in the toolbar at the top of the screen, read the message and take appropriate action by pressing the <b>Esc</b> key to return to the work area. These precautionary messages may contain valuable information about your transaction.</p> 
7	<p>Press <b>Enter</b> again if you wish to continue.</p>
8	<p>Observe the <b>Record Accepted</b> checkmark in the toolbar, indicating that the record has been saved.</p> 
9	<p>If errors occur, one or more red X's appear in the toolbar. Correct these errors as directed in the error message. See an example message below.</p>  <p>When complete, press <b>Enter</b> again to save the record. If you cannot correct an error, press the <b>Escape</b> key to clear the screen. You will lose your work.</p>

*Continued on next page*

## Updating a Record in the 7i Screen, Continued

### Searching

Use the Binoculars icon to search the 7i screens. In the drop-down menu, select Find/Search and you will be in the Find mode. This is indicated at the far right corner.

Step	Action
1	Click the Binoculars icon in the toolbar. 
2	Select <b>Find/Search</b> from the drop-down menu. <b>Find mode</b> displays in the right corner.
3	Place the cursor in the field to search. Enter the criterion (use the lookup function where possible to find your item).
4	Press <b>Enter</b> .
5	<p>The result displays. When there is more than one record for the searched criterion, click the forward and back arrows to “page” through the results.</p> <div style="text-align: center;">  </div> <p><b>Note:</b> Multiple criteria can be used to limit the number of records that display. Complete the desired fields and then press <b>Enter</b> to display the record(s).</p>

# The Triad Screen

---

## Introduction

This section gives you information about the Triad Screen and its use.

---

## Characteristics of the TRIAD screen

The Triad screen contains the navigation bar at the *bottom* of the screen.

There are three modes of operation for the Triad screen. The *middle rectangle* in the navigation bar denotes the mode you are currently in. The Triad modes are:

- **Add** allows you to enter new records into the database.



- **Browse** allows you to:

- Update records
- Maintain or change a record
- View a record
- Delete a record



- **Select** allows search (query) options and a refresh of the screen.



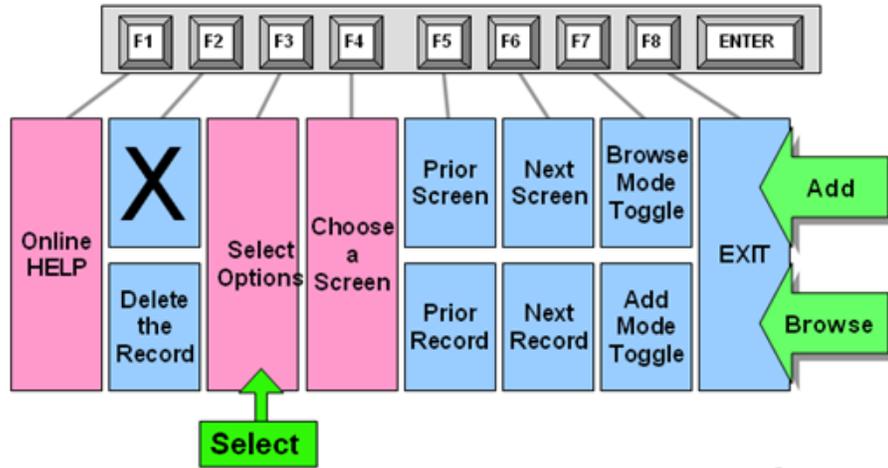
---

*Continued on next page*

## The Triad Screen, Continued

### Function keys for TRIAD screens

The following diagram gives you a description of the controls for the Triad Screen.



### Searching

When you search for an item in the Browse Mode, use the \* (asterisk) symbol as a wildcard for the IFAS TRIAD screens. This symbol will yield anything that contains the letters that precede or follow it; for example,

- **\*son** retrieves all records that end with “son”
- **son\*** retrieves records that have “son” as the beginning of the word.
- **\*son\*** retrieves all records with “son” in them.

In the Select mode, you enter search criteria in selected fields and press Enter. A record will be displayed matching the criteria.

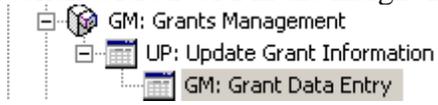
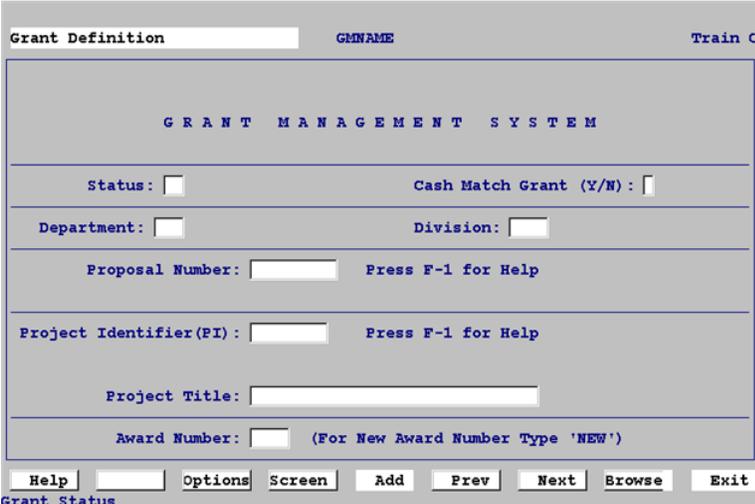
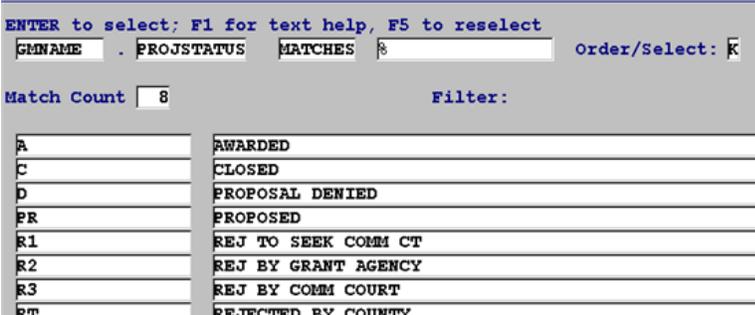
### Help

Pressing F1 on any field will provide helpful instructions, or a pick list, if available.

# Creating a Record in the Triad Screen

## Practice Triad screen

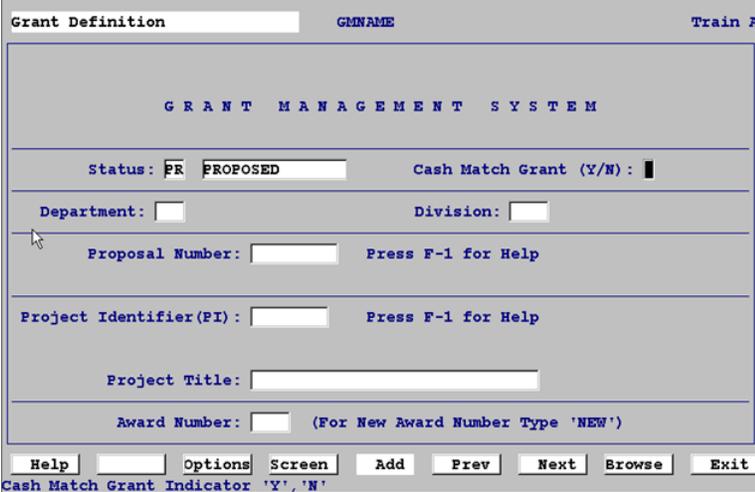
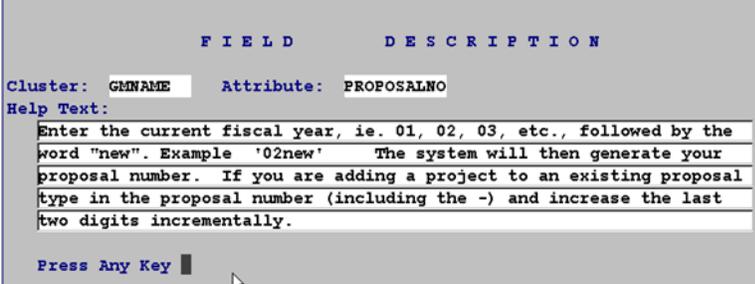
Follow this procedure to create a record using the Triad screen. You must be in the **ADD** mode to create a record. Use Tab, arrow keys or mouse to navigate to the desired field.

Step	Action
1	<p>Type the mask <b>GMUPGM</b> in the TypeAhead/History box. Press <b>Enter</b>. Or, select the plus signs for GM and UP. Then, double-click <b>GMUPGM</b> in the Insight menu tree.</p>  <p>The following screen displays.</p> 
2	Your cursor displays in the <b>Status</b> field. Press <b>F1</b> .
3	<p>The <b>Help</b> screen displays a pick list. Move the cursor with the arrow keys or by tabbing.</p> 

*Continued on next page*

## Creating a Record in the Triad Screen, Continued

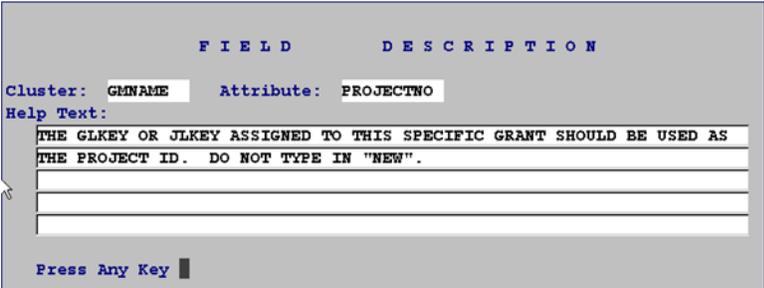
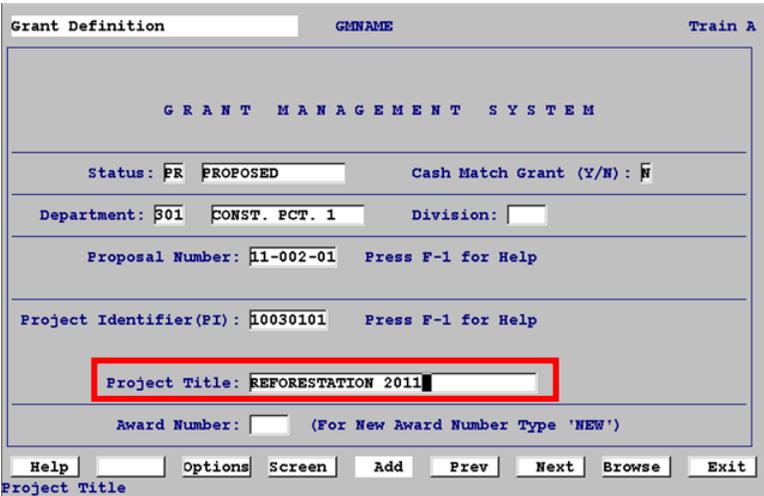
### Practice Triad screen (continued)

Step	Action
4	Press <b>Enter</b> .
5	<p>Tab to the next field. Place <b>Y</b> or <b>N</b> to indicate if this is a cash match grant. The cursor moves to <b>Department</b>.</p> 
6	Enter your department. The division number is optional. You may tab, arrow or mouse click to navigate to the desired field.
7	<p>Place your cursor in the Proposal Number field and press <b>F1</b> for <b>Help</b>. <b>Help</b> gives you instructions for entering data in the field. After reading the text, press any key to return to the original screen.</p>  <p>To enter the Proposal Number, as directed by the <b>Help</b> screen, place the last two digits of the current fiscal year with “<b>new</b>” following it in the Proposal Number field. Press any key to return to the <b>GMNAME</b> screen.</p>

*Continued on next page*

# Creating a Record in the Triad Screen, Continued

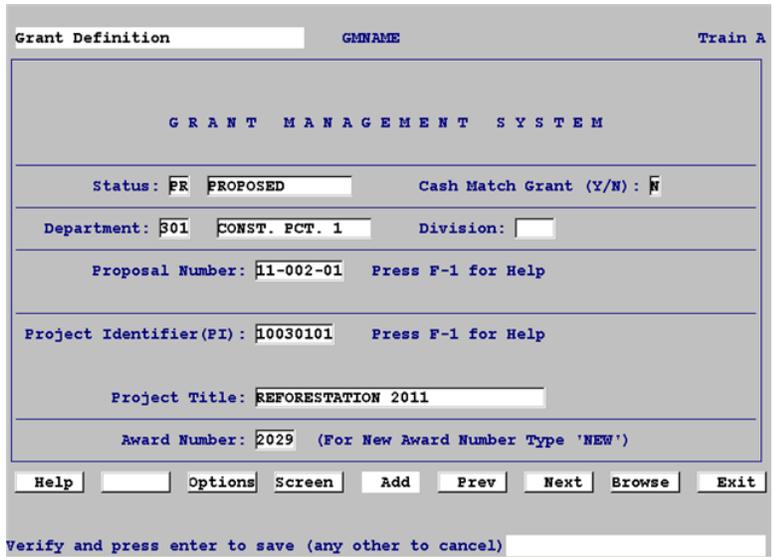
Practice Triad screen  
(continued)

Step	Action
8	<p>With your cursor in the Project Identifier field, enter the GL or JL key</p>  <p>Remember, you can press <b>F1</b>, if you need <b>Help</b>. After reading the <b>Help</b> text, press any key to return to the original screen. Enter either the GL or JL key for this field. The cursor moves to the <b>Title</b> field.</p>
9	<p>To find guidelings for the Project Title field, press <b>F1</b> press any key to return to the input screen. Type the Project Title.</p> 

*Continued on next page*

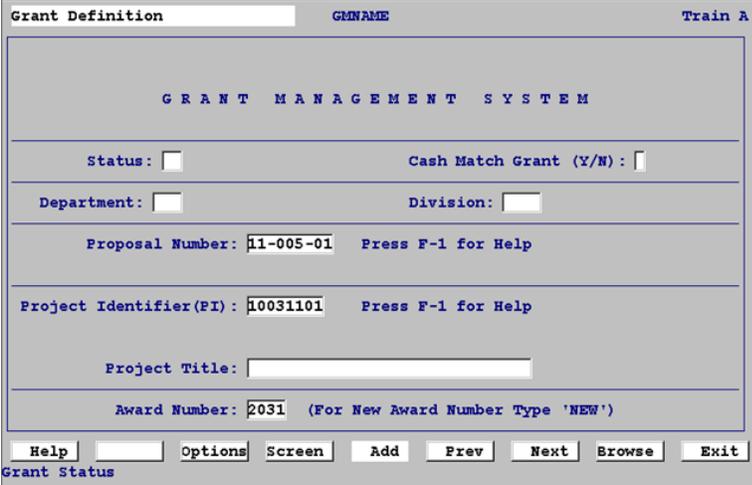
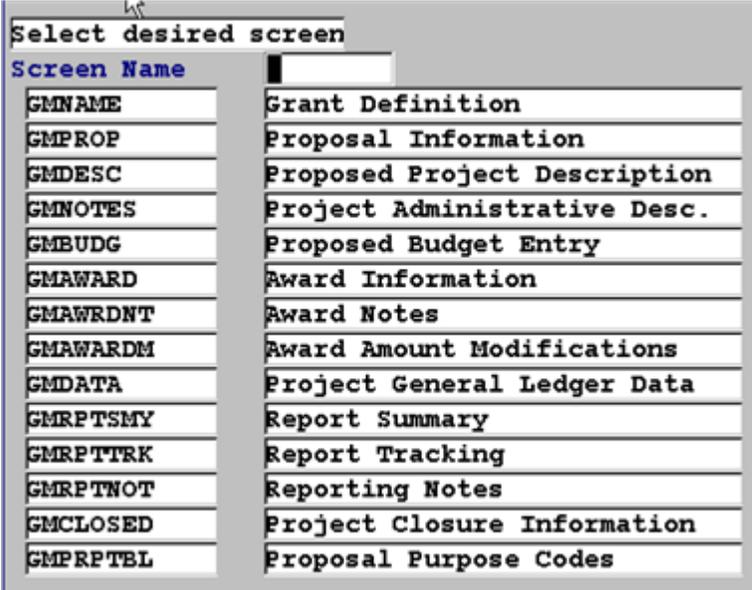
## Creating a Record in the Triad Screen, Continued

### Practice Triad screen (continued)

Step	Action
10	Tab to the next field, Award Number. As directed on screen, type “New” for a new award number.
11	Press <b>Enter</b> .
12	<p>An award number displays. The system will warn you to verify the data and to press any other key to cancel the transaction.</p>  <p>The screenshot shows the 'Grant Definition' screen with the following fields and values:</p> <ul style="list-style-type: none"> <li>Status: PR PROPOSED</li> <li>Cash Match Grant (Y/N): N</li> <li>Department: 301 CONST. PCT. 1</li> <li>Division: (empty)</li> <li>Proposal Number: 11-002-01</li> <li>Project Identifier (PI): 10030101</li> <li>Project Title: REFORESTATION 2011</li> <li>Award Number: 2029 (For New Award Number Type 'NEW')</li> </ul> <p>Buttons at the bottom include: Help, Options, Screen, Add, Prev, Next, Browse, Exit.</p> <p>Message at the bottom: Verify and press enter to save (any other to cancel)</p>
	<p>You must press <b>Enter</b> again to save the record.</p> <p>Always read your messages at the bottom of the screen. Refresh your record to confirm that is saved.</p> <p><b>Note:</b> Your security will limit the tasks that you can complete. Refresh the screen by pressing <b>F3</b>. Move the cursor to <b>Select Refresh</b> and press <b>Enter</b>.</p>

# Creating a Record in the Triad Screen, Continued

## Practice Triad screen (continued)

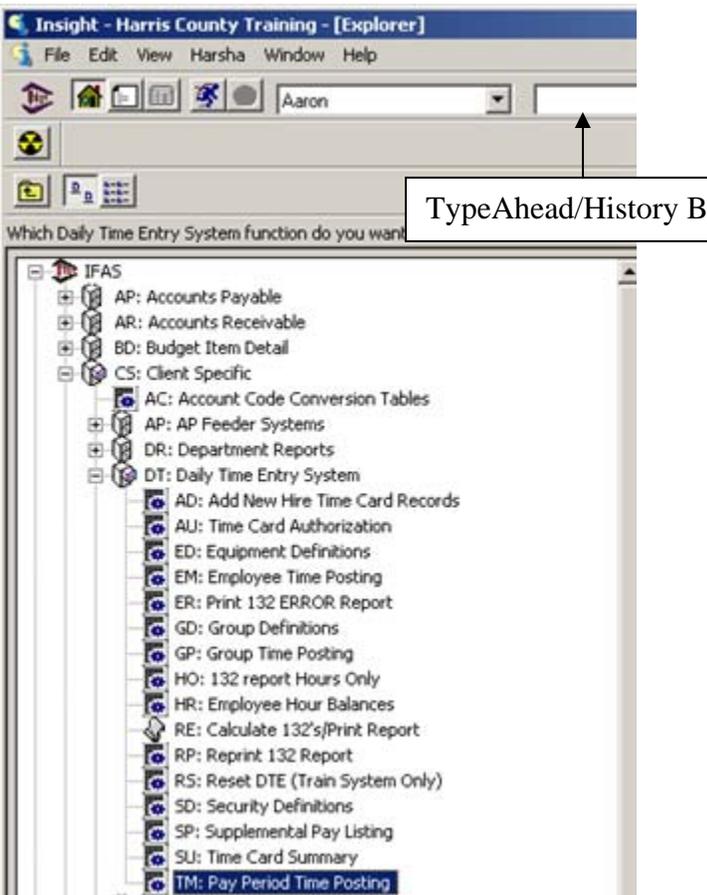
Step	Action
13	<p>Another screen displays that defaults with a proposal number, project identifier and award number. You must change the proposal number and award number for the next record you add.</p> 
14	<p>For this module, press <b>F4</b> to get a list of the remaining screens to be completed. See below.</p> 

# Updating a Record in the TRIAD Screen

**Introduction** This section covers how to update a record in a TRIAD screen.

**General Procedures** In the **TRIAD** screen, the Tab key and arrow keys are for navigating and the **Enter** key is for saving the record.

**Updating a Record:  
Practice  
CSDTTM**

Step	Action
1	<p>Type <b>CSDTTM</b> in the TypeAhead/History Box and press <b>Enter</b> or click the plus sign for CS and DT. Then, double-click <b>CSDTTM</b> in the directory tree of the Explorer view.</p> 

*Continued on next page*

# Updating a Record in the TRIAD Screen, Continued

Updating a Record:  
Practice  
CSDTTM  
(continued)

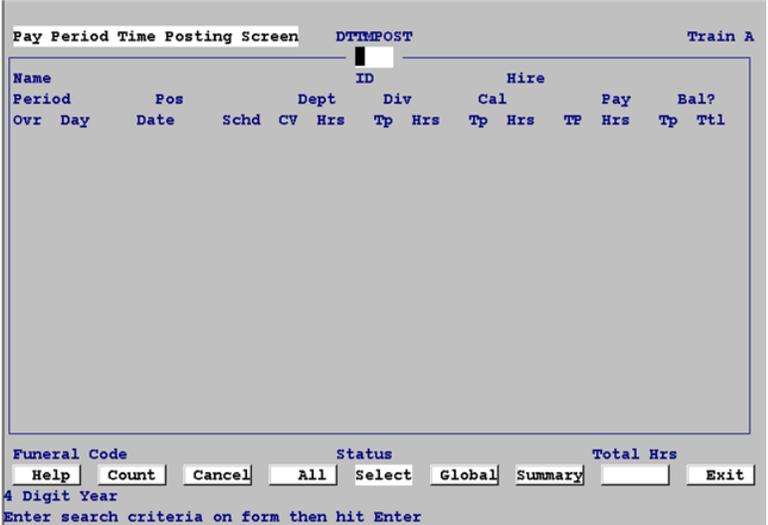
Step	Action
2	<p>The instructor will direct you as to which record to update.</p> <p>If you are currently in the Add mode, display the Browse mode by pressing <b>F7</b>.</p> <p>In the Browse mode, “page” through the records by pressing <b>F5</b> and <b>F6</b> until the desired record is found. The following is an example of a <b>CSDTTM</b> screen.</p>
3	<p>Another way to find the record is to press <b>F3</b>. With your cursor on <b>Select New</b>, press <b>Enter</b>.</p>

Continued on next page

## Updating a Record in the TRIAD Screen, Continued

Updating a Record:  
Practice  
CSDTTM  
(continued)

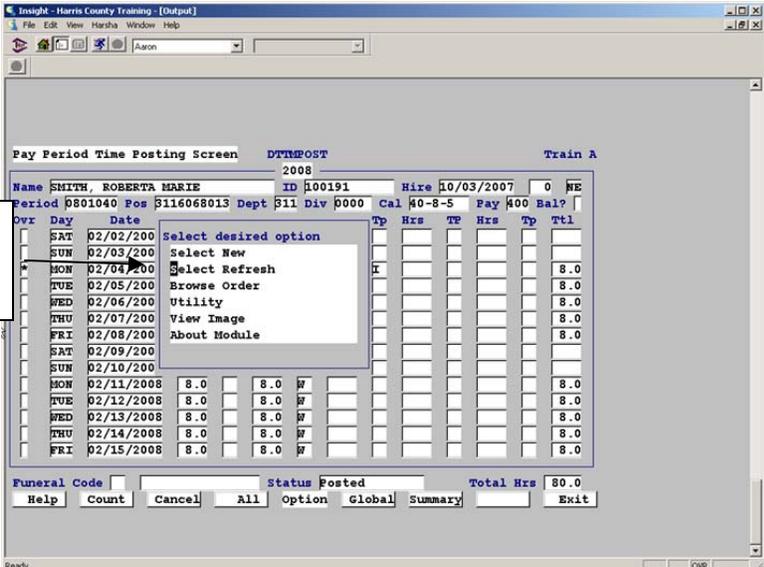
Name  
Field

Step	Action
4	<p>An empty record displays. Type search terms in as many fields as you can to limit the search. Tab between fields.</p>  <p>The screenshot shows a terminal-style interface titled 'Pay Period Time Posting Screen' with 'DTMPOST' and 'Train A' in the top right. The main area contains a search form with the following fields: Name, Period, Pos, Dept, Div, Cal, Hire, Pay, and Bal?. Below these fields are several buttons: Help, Count, Cancel, All, Select, Global, Summary, and Exit. At the bottom, there is a prompt: '4 Digit Year' and 'Enter search criteria on form then hit Enter'.</p>
5	Type search terms in as many fields as possible to limit the search. Press <b>Enter</b> and the result of the search displays.
6	For example, you must update Wallace Brown's record. Enter Brown* in the name field to find anyone with the last name of Brown. Press <b>Enter</b> .
7	The results of your search display. Update the record with data as needed.
8	Press <b>Enter</b> to save the record.

*Continued on next page*

## Updating a Record in the TRIAD Screen, Continued

### Updating a Record: Practice CSDTTM (continued)

Step	Action
9	<p>Press <b>F3</b> to go to the <b>Select</b> mode. Move the cursor down to <b>Select Refresh</b> and press <b>Enter</b>. This will allow you to refresh the screen's data and return to the updated record.</p>  <p><b>Note:</b> If the updated record is not returned with <b>Select Refresh</b>, you need to conduct a search for it. Be aware of reference numbers or other unique characteristics the record possesses to use as search criteria. For the example above, you can use the name or an ID number to narrow the search.</p>
10	<p>After finding your record, update as needed. For the <b>DTTMPOST</b> screen, you can change hours and hour types. Tab to the <b>Hrs</b> field that corresponds to the correct date. Make the change.</p>
11	<p>Tab to the (<b>TP</b>) column and change as needed.</p>
12	<p>Press <b>Enter</b> to save.</p>
13	<p>Press <b>F3</b>. Press <b>Select Refresh</b>. The modified record displays.</p> <p><b>Note:</b> If the record does not display, you will need to conduct a search. Press <b>F3</b> and Select New. Enter unique search terms, when possible, and press <b>Enter</b>.</p>

# IFAS Classic Screen

---

**Introduction** This section gives information about the Classic Screen and its use.

---

**Characteristics of the IFAS Classic screen** You can determine which type of screen you are viewing by the navigation tool that is displayed. The IFAS Classic screen uses the following toolbar to navigate.



Anytime you see this toolbar at the *top* of the screen, you know that you are on an IFAS Classic screen. These individual buttons are linked to function keys that you may use while in this screen.

In addition, there are two modes of actions in this screen.

- **Collect**  mode allows you to enter new records into the database.
- **Browse**  mode allows you to:
  - Update a record
  - Maintain or change a record
  - View a record (by “paging” through)
  - Delete a record

You can also use the function keys that correspond to the buttons, instead of the toolbar, as shown on the next page.

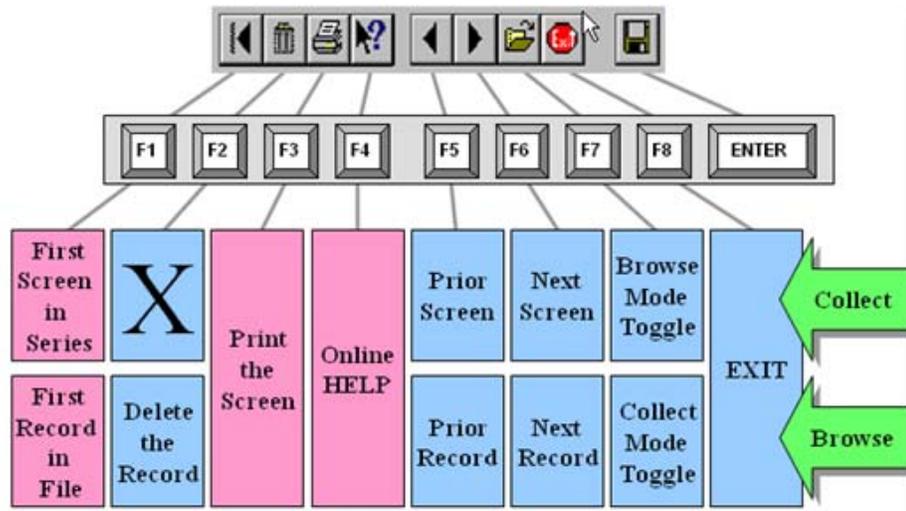
---

*Continued on next page*

## IFAS Classic Screen, Continued

### Function keys for IFAS Data Entry screens

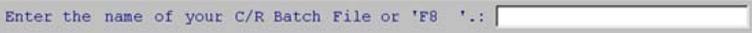
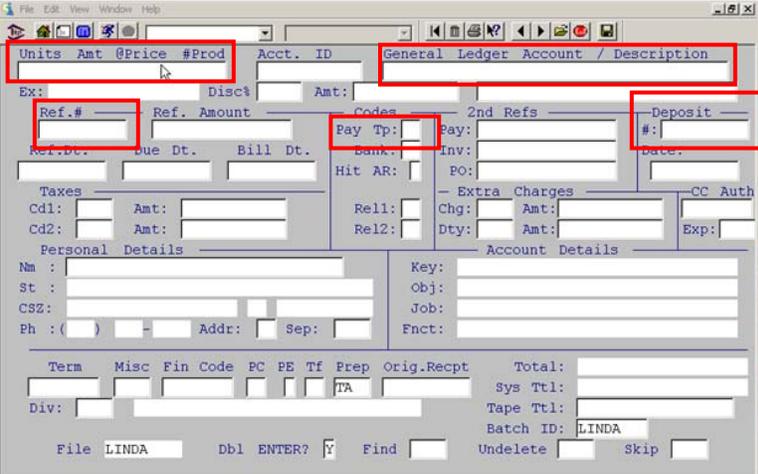
The following diagram gives you the controls (F keys and buttons) for the operations in Classic Screens.



# Creating a Record in the Classic Screen

## Practice – Classic screen

Follow this procedure to create a record in the Classic screen:

Step	Action
1	<p>In the Insight Explorer view, open the mask, <b>ARCC</b> by following the tree, or type <b>ARCC</b> in the TypeAhead/History box.</p> 
2	<p>Click the <b>CRBATCH</b> button.</p> 
3	<p>Enter a name in the C/R Batch File field.</p> 
4	<p>Press <b>Enter</b>. Note the message in the bottom left hand corner. You will create a new record by pressing <b>Enter</b>.</p> 
5	<p>Press <b>Enter</b> to display the new record to complete. Note the placement of the toolbar, in the upper right of the screen. Complete the required fields (see below).</p> 

# Updating a Record in a Classic Screen

---

**Introduction** This section covers how to update a record in a Classic screen.

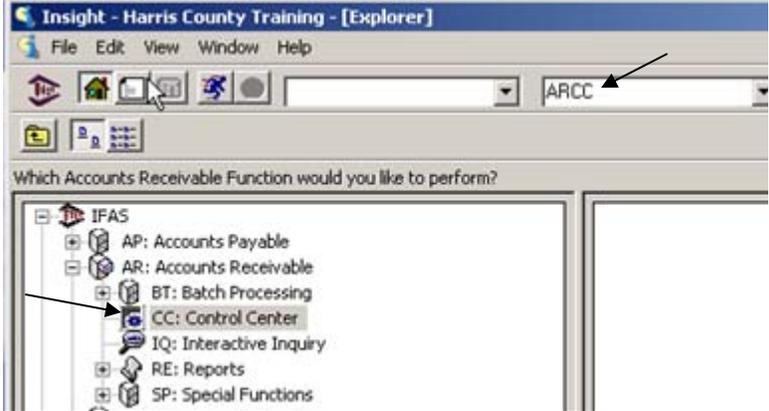
---

**General Procedures** Here are some things to remember when working in a Classic IFAS screen.

- To move between fields, use the Tab key and the four arrow keys.
  - To save your record, press Enter.
  - Watch the bottom left-hand corner of the IFAS screen for messages.
- 

**Updating a Record:** The mask **ARCC** allows you to post cash receipts.

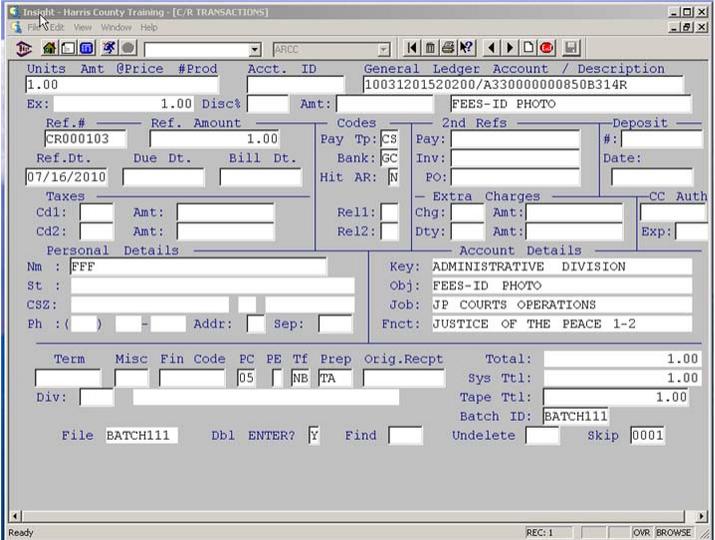
**Practice ARCC**

Step	Action
1	<p>Type <b>ARCC</b> in the Type Ahead/History box and press <b>Enter</b> or double-click <b>ARCC</b> in the directory tree. This will open an Accounts Receivable Control Center, a Classic Screen.</p>  <p>The screenshot shows a window titled 'Insight - Harris County Training - [Explorer]'. At the top, there is a menu bar with 'File', 'Edt', 'View', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. A text box on the right side of the toolbar contains the text 'ARCC', with an arrow pointing to it from the right. Below the toolbar is a section titled 'Which Accounts Receivable Function would you like to perform?'. This section contains a directory tree with the following items: 'IFAS', 'AP: Accounts Payable', 'AR: Accounts Receivable', 'BT: Batch Processing', 'CC: Control Center', 'IQ: Interactive Inquiry', 'RE: Reports', and 'SP: Special Functions'. The 'CC: Control Center' item is highlighted with a mouse cursor, and an arrow points to it from the left.</p>

*Continued on next page*

## Updating a Record in a Classic Screen, Continued

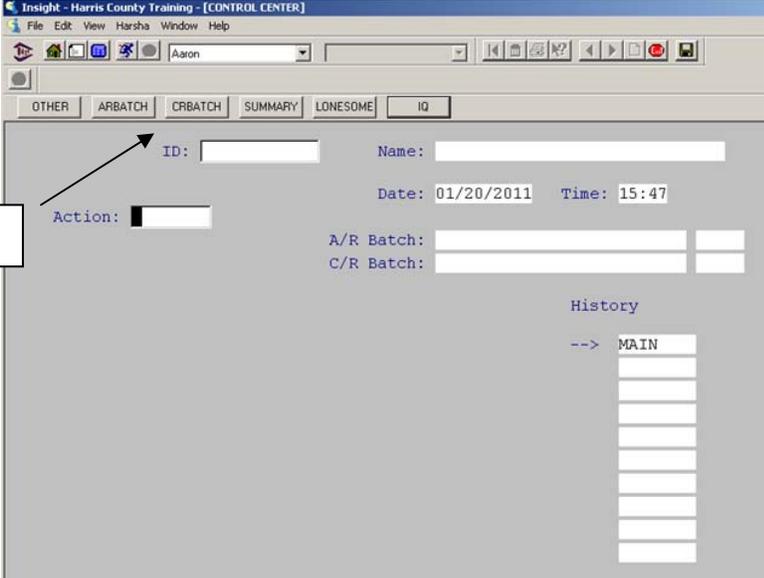
### Updating a Record: Practice ARCC (continued)

Step	Action
2	<p>Find the record to update as directed by the instructor. The following is an example of an ARCC record.</p>  <p>The screenshot shows the IFAS ARCC record screen. At the top, it displays 'Units Amt @Price #Prod Acct. ID' with values '1.00', '1.00', and '10031201520200/A330000000850B314R'. Below this, there are fields for 'Ex:', 'Disc%', and 'Amt:'. The 'General Ledger Account / Description' is 'FEES-ID PHOTO'. The screen is divided into several sections: 'Ref.# Ref. Amount Codes 2nd Refs Deposit', 'Ref.Dt. Due Dt. Bill Dt.', 'Taxes', 'Personal Details', and 'Account Details'. The 'Personal Details' section shows 'Nm : FFF', 'St :', 'CSZ:', 'Ph : ( ) - Addr: Sep:'. The 'Account Details' section shows 'Key: ADMINISTRATIVE DIVISION', 'Obj: FEES-ID PHOTO', 'Job: JP COURTS OPERATIONS', and 'Fnct: JUSTICE OF THE PEACE 1-2'. At the bottom, there are summary fields for 'Total: 1.00', 'Sys Ttl: 1.00', 'Tape Ttl: 1.00', and 'Batch ID: BATCH111'. There are also checkboxes for 'Dbl ENTER?' and 'Undelete', and a 'Skip' field with the value '0001'.</p>
3	<p>Data in IFAS is recorded in fields. Some fields are mandatory. If the field is not completed correctly, an error shown at the bottom of the screen will prevent the record from being saved.</p> <p>Follow the directions given by the instructor to update a field. Save the update by pressing <b>Enter</b>.</p>

*Continued on next page*

## Updating a Record in a Classic Screen, Continued

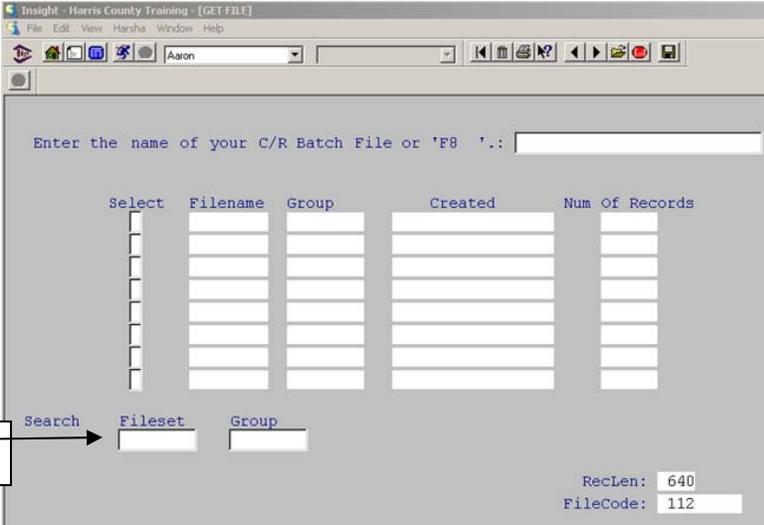
### Searching

Step	Action
1	<p>If you want to look for a record, on the Control Center screen, click the following buttons near the top: <b>Other</b>, <b>Newcr</b>, <b>Prior</b>, and <b>CRBATCH</b>. On the new screen (Get File), you may enter the C/R Batch file name and press <b>Enter</b> to display it.</p> 

CRBATCH button

## Updating a Record in a Classic Screen, Continued

### Searching (continued)

Step	Action
2	<p>You also can use the <b>Fileset</b> field at the bottom of the Get File screen to enter the selection criteria using @ as a wildcard.</p>  <p><b>Note:</b> The wildcard yields anything that contains the letters that precede or follow it. For example:</p> <ul style="list-style-type: none"> <li>• @son retrieves all records that end with “son”</li> <li>• son@ retrieves records that have “son” as the beginning of the word</li> <li>• @son@ retrieves all records with “son” in them.</li> </ul> <p>Press <b>Enter</b> after typing your search criteria.</p>

Fileset field for searching

# Settings

---

## Introduction

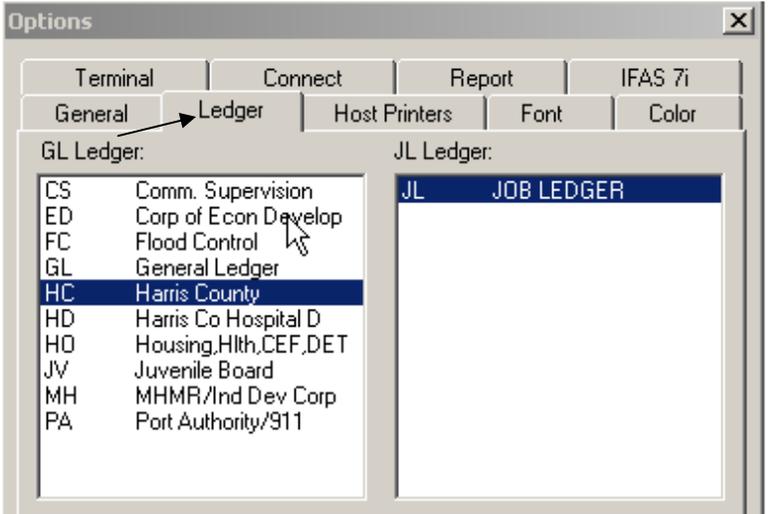
This section of the manual refers to default ledgers and Favorites.

---

## Checking your default ledger

This procedure identifies the default ledger being used for work in IFAS.

Step	Action
1	Click <b>Edit</b> in the menu bar.
2	Choose <b>Options</b> .
3	Find the Ledger tab. Click the tab.
4	Select the ledger to use as the default.
5	Click <b>OK</b> .

The screenshot shows the 'Options' dialog box with the 'Ledger' tab selected. The 'GL Ledger:' list contains the following items: CS Comm. Supervision, ED Corp of Econ Develop, FC Flood Control, GL General Ledger, HC Harris County (highlighted), HD Harris Co Hospital D, HD Housing, Hlth, CEF, DET, JV Juvenile Board, MH MHMR/Ind Dev Corp, and PA Port Authority/911. The 'JL Ledger:' list contains JL JOB LEDGER.

## Favorites

Favorites or commonly used tasks can be set in IFAS. See [www.justifas.net](http://www.justifas.net) under General Information, IFAS Documentation for instructions.

---

## IFAS 101: REVIEW 2

---

### Introduction

Write the answer to these review questions in the space provided.

---

### Insight

1. What important information is found in the title bar of Insight?
  2. Where is the Type Ahead/History Box located?
  3. What is the function of the Type Ahead/History Box?
  4. How can you switch between the Explorer and Output views?
  5. Explain how to open a function (task) by using the Insight Menu Tree.
  6. How can you quickly access a previously used mask?
- 

### TRIAD

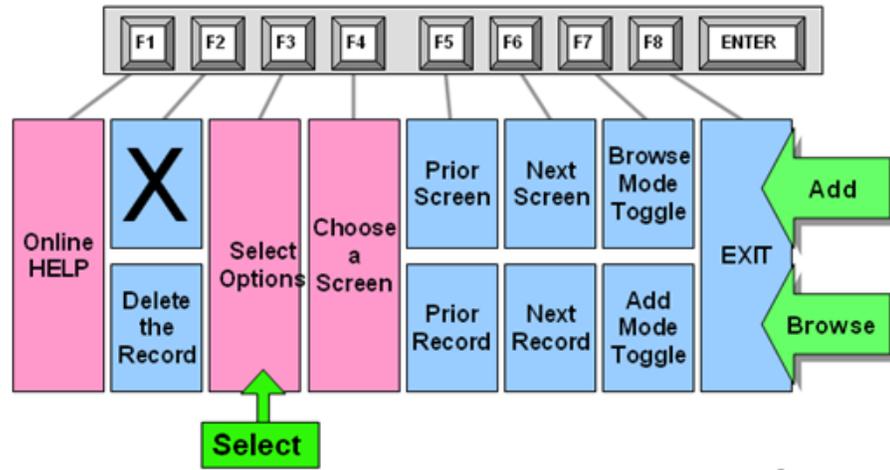
7. How do you know if you are in a Triad screen?
  8. How do you know which mode you are in on a Triad screen?
  9. Which keys should be used to move between fields?
  10. Which key is used to save information?
- 

*Continued on next page*

## IFAS 101: REVIEW 2, Continued

### TRIAD (continued)

The following figure is a diagram of Triad screens function keys.



### Function Keys

11. What is F7 used for in the Triad screen?
12. What does F6 do in Add mode? In the Browse mode?
13. What does F5 do in Add mode? In the Browse mode?
14. What does F4 do in a Triad screen?
15. How should one navigate in the Triad mode?
16. What mode(s) can you use to save information in the data fields?  
What key do you use to save?
17. What function key(s) allows you to use a pick list?

*Continued on next page*

## IFAS 101: REVIEW 2, Continued

### Answers

---

**Answers:**  
**Insight**

1. The name of the database you are working in.
  2. Above the directory tree, over to the right.
  3. The function of this box is to bring up the mask that you enter.
  4. Press the “View Output” button. 
  5. Press the + on each directory until you get to the name of the task you want to complete.
  6. Use the arrow within the TypeAhead/History Box to select from a list of previously used masks.
- 

**Answers:**  
**TRIAD**

7. The Triad menu bar appears at the bottom of the screen.
  8. The center button on the Triad menu bar tells you the mode you are in.
  9. The arrow keys and the tab key should be used to move to fields.
  10. The Enter key saves the record.
- 

**Answers:**  
**Function keys**

11. The F7 toggles between the Browse mode and the Add mode.
  12. F6 in the Add mode brings up the next screen. In Browse, it brings up the next record.
  13. F5 takes you to the previous screen in both the Add mode and the Browse mode.
  14. Brings up a screen pick list.
  15. Use the arrow keys and tab.
  16. Save information in the Add mode for new records and Browse mode for updates. Enter saves.
  17. The F1 and F4 keys take you to a pick list.
-

## Glossary

**Explorer View** Similar to Windows® Explorer; it is used to access the functions of IFAS through the Insight Menu Tree and masks

---

**Functions** Various data entry screens, interactive inquiries and reports found within the Modules

---

**IFAS** Integrated Financial Administrative Solutions software program

---

**IFAS Screens** IFAS data entry screens that are used for updating the selected database; interactive inquiry screens are used for getting information from the database; CDD report screens are used for viewing information in report form.

---

**Insight** The graphical user interface (GUI) for IFAS

---

**Modes** The means of determining what you can do with data while in a particular Triad or IFAS Classic screen

In the Triad screen, there are three modes:

- Add - used to enter new data into the system
- Browse - used to edit what was entered in the ADD mode
- Select - used to search for a particular record or data entry

There are two modes available in the Classic data entry screens:

- Collect - used for entering new data into the system
- Browse - used to edit what was entered in the Collect mode

There are two modes in the 7i screen:

- Find mode – used to search records
  - Add – used to create records
-

## Glossary, Continued

---

<b>Modules</b>	The major components of IFAS found on the Insight Menu Tree
<b>Output View</b>	A limited record of activity performed in IFAS for your current session. All records of activity are lost when you log off.
<b>Pick List</b>	A listing of all data that can be entered into a particular field
<b>Selection Criteria</b>	Names or descriptions that are entered in a <b>Prompts</b> box for a CDD report. They limit the results of a search of the database by retrieving only the specified descriptions.
<b>Wildcard symbol</b>	In the Triad screen, the wildcard symbol is *. The system will search the database for the data part that you entered. For the IFAS Classic screens, the symbol is @. The wild card for the 7i search is % or *.

---