Program Basics Guide

Contents

Program Basics

Note: Visit our website at www.blackbaud.com for the latest documentation and information.

The Program Basics chapter is designed to familiarize you with screens, buttons, menu options, and terms used throughout our software. The items described in this chapter include standard parts of a screen, toolbar buttons, standard screen buttons, menu options, function keys, and common procedures. By reading this chapter, you can become more comfortable using the program by familiarizing yourself with the screens, tools, and commands used to navigate.

Understanding the Interface

Our software provides a wide variety of tools to make using the programs quick and easy. These tools are accessed through a common interface designed for efficiency. The main component of the interface is the shell, which is a centrally located hub for accessing all programs. This section describes the parts of the shell and other components of the interface.

Parts of the Shell

The shell provides a central area where you can enter all areas of a program. When you click a link for an area, it appears as a page in the shell.

If you have multiple databases, you can switch to a different database from the shell. Using the **Create Links to Blackbaud Systems** utility on the Plug-ins page, you can add links to the navigation bar to access 6.x subsidiaries directly from the shell. For more information about the Create Links to Blackbaud Systems utility, see "Changing Passwords" on page 56.

If you have security rights to change user options, you can set up the system to display specific information on the Home page of each program, such as commonly used accounts and vendors, or action reminders. You can also use **Options** to select another program or page as the default that appears when you open the software.
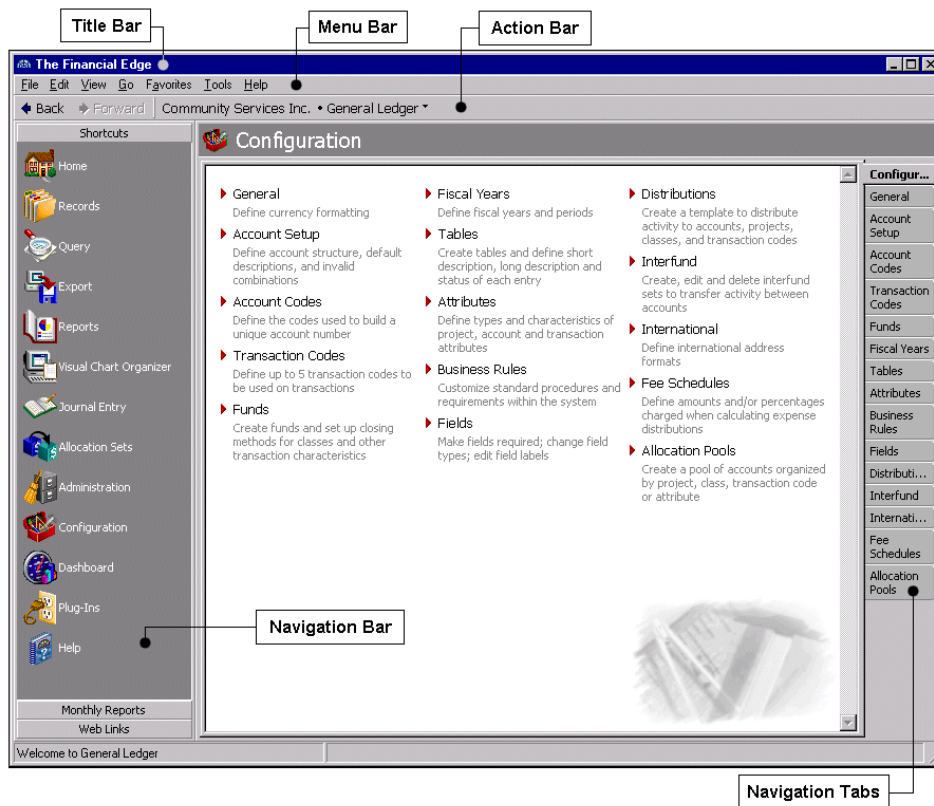
Note: We do not recommend using the **X** button on the title bar to close the program. To properly exit the software, from the **File** menu, select **Exit**.

Title Bar. The title bar displays the product name and has buttons to minimize, maximize, and close the shell.

Menu Bar. The menu bar displays menus containing commands for various functions throughout a program. The commands available depend on the area of the program you have open.

Action Bar. The action bar displays your organization name and the name of the program in which you are working. You can use the **Back** and **Forward** buttons to quickly move through screens and areas. Much like a Web browser, you can use these buttons to move to previously accessed pages.

Navigation Bar. The navigation bar contains links to all main areas of a program. When you click a link, a page for that area opens in the shell and displays additional links to the utilities found within that area.

By default, the navigation bar is displayed on the left side of the screen. You can hide the navigation bar or move it to the top, bottom, left, or right side of the shell. To move or hide the navigation bar, place your cursor over the navigation bar and right-click your mouse to display a shortcut menu. Select **Hide** to remove the navigation bar or move the location of the navigation bar by selecting **Align Top**, **Align Left**, **Align Bottom**, or **Align Right**.

Navigation Tabs. The navigation tabs mirror the links on each page and provide an additional way to navigate through the program.

Parts of a Record Screen

Many record screens in our software contain the same standard parts. Understanding the various parts and how each works is helpful when navigating in the program. The following batch record screen from *Journal Entry* in *General Ledger* is an example of a commonly used record screen.
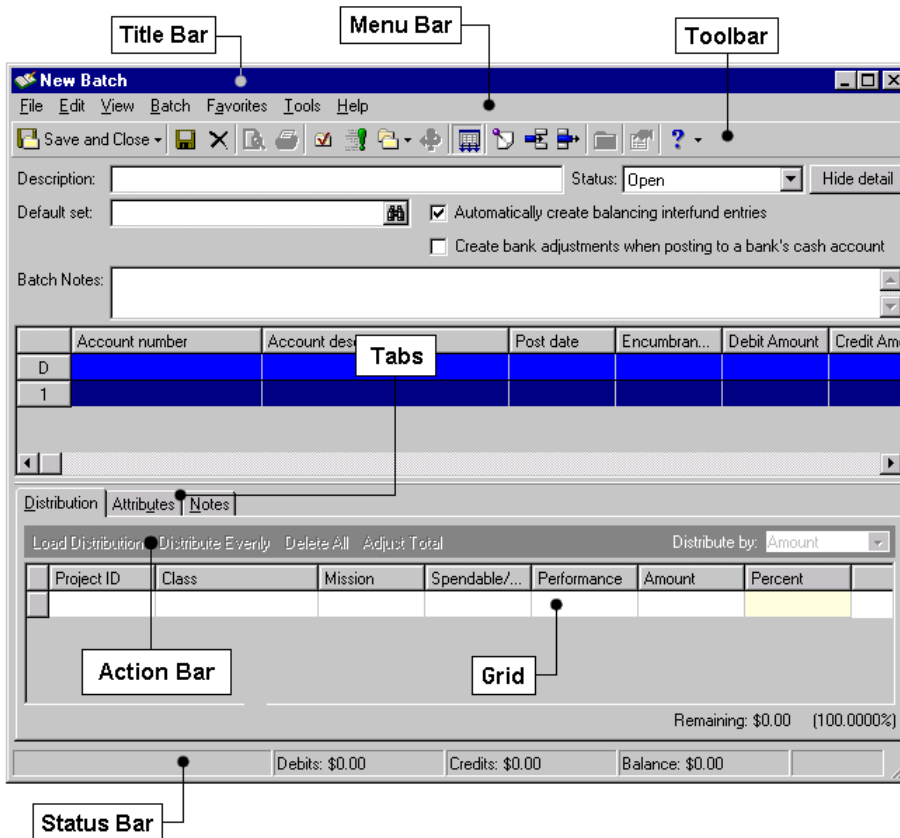
Title Bar. The title bar displays the name of the record.

Menu Bar. The menu bar lists commands for program functions related to the record. Our software has several common menus including **File**, **Edit**, **View**, **Favorites**, **Tools**, and **Help**.

Toolbar. The toolbar contains buttons representing common commands. If you are unsure what command a toolbar button represents, you can place your cursor directly over the button to access a "tooltip," a pop-up description of the button. You can use these buttons as alternatives to menu commands.

Note: You can activate or deactivate "tooltips" in **Options** on the General tab.

Tabs. Some records and other screens in the programs contain tabs. Like tabs on folders in a filing cabinet, these tabs help organize information in your records. You access information by clicking a tab. You can also select a tab by pressing **ALT** + the underlined letter in the tab name.

Action Bar. Many screens throughout the software contain an action bar that provides a centralized location to perform common actions such as adding, editing, or deleting information. If you click the down arrow beside the title on an action bar button, additional selections appear for that button.

Note: To move between rows in a grid column, press **CTRL** + the up or down arrow key.

Grids. Grids contain columns and rows made up of cells. You can enter information into a cell by making a selection from a drop-down list or simply entering text. You can also sort information in a grid by clicking the column heading.

Status Bar. The status bar at the bottom of a screen or record displays important messages or helpful tips. For example, when you place the cursor in a date field, a message states you can "Press **F3** for Today's Date, **F7** for Calendar."

Menus

Numerous menu bar commands appear throughout the program. When you select certain commands from the menu bar, a submenu may appear listing additional options. Some commands appear only in certain areas.

Tip: A shortcut key accesses a menu item when it is pressed at the same time as the **ALT** key. The shortcut key letter for a particular menu item is underlined in the menu bar or on a button or tab.

You can also access menu bar commands by using shortcut keys. Most menu items as well as some buttons and other features contain shortcut keys. A shortcut key accesses a menu item when it is pressed at the same time as the **ALT** key. The shortcut key is immediately recognizable because it is underlined on the menu bar, button, or tab.

To access a menu item with a shortcut key, simultaneously press the **ALT** key and the shortcut key letter for that particular menu item. To access a submenu, press **ALT**, the letter on the main menu, and the key for the underlined letter in the submenu command.

File Menu

The options on the **File** menu depend on the program and area in which you are working. You can use keyboard commands to quickly access some **File** menu options. Where applicable, each keyboard command is included with the **File** menu option description.

New. If you select **New** from the **File** menu of an open record, you can add a new record of the same type as the record currently open.

If you select **New** without a record open, a submenu appears from which you can select a record type. The keyboard command for **New** is **CTRL + N**.

Open. If you select **Open** from the **File** menu of a record, you can search for a record of the same type as the record currently open.

If you select **Open** without a record open, a submenu appears from which you can select a record type. The keyboard command for **Open** is **CTRL + O**.

Note: Deleted records cannot be recovered without restoring to a backup.

Delete. When you select **Delete** from the **File** menu of a record, that record is permanently removed from the database.

Save. When you select **Save** from the **File** menu of a record, any changes made to the record are saved. The record remains open, and you can continue adding and editing information. The keyboard command for **Save** is **CTRL + S**.

Tip: Save and New can save you time when adding numerous records.

Save and New. When you select **Save and New** from the **File** menu of a record, any changes you made are saved, the record is closed, and a new blank record opens. This eliminates the additional steps of saving and closing the record, and then selecting **File**, **New** to open the next blank record. This feature reduces data entry time when adding a large number of records. The keyboard command for **Save and New** is **CTRL + E**.

Save and Close. When you select **Save and Close** from the **File** menu of a record, any changes made are saved, the record is closed, and you return to the page from which you accessed the record. This eliminates the additional steps of saving and closing the record. The keyboard command for **Save and Close** is CTRL + L.

Properties. When you select **Properties** from the **File** menu of a record, the Properties screen for the record appears. The Properties screen displays such information as when and by whom the record was created, and when and by whom it was last changed.

Print Setup. When you select **Print Setup**, the Print Setup screen appears. From this screen you can select the printer to which you want to print, designate a paper size and source, and choose the paper orientation. For more information about printing, see "Setting up a printer" on page 57.

> **Note:** Some menu options are available only for specific programs.

Preview. When you select **Preview** from the **File** menu, the Select a Parameter File screen appears. From this screen you can select or create a new parameter file to use when previewing a report. Select a parameter file, and click **Select to preview**.

Print. When you select **Print** from the **File** menu, the Select a Parameter File screen appears. From this screen you can select or create a new parameter file to use when printing a report.

Export. When you select **Export** from the **File** menu, the Select a Parameter File screen appears. You can export the selected information in a variety of formats.

Send as Mail. When you select **Send as Mail** from the **File** menu of a record, you can send information via email.

Recently Accessed Records. When you select **Recently Accessed Records** on the **File** menu, a submenu appears listing the records opened previous to the current record. Select a record from the submenu to open it.

Close. When you select **Close** from the **File** menu of a record, the record closes and you may be prompted to save.

Exit. When you select **Exit** from the **File** menu, you exit the shell. Open records are closed when you exit, but the database remains open and you can reenter the program without logging in using your password.

Exit and Sign Out. When you select **Exit and Sign Out** from the **File** menu, all open records are closed and you exit the database and close the program. You must reenter your password to log back into the program.

Edit Menu

The options on the **Edit** menu depend on the area of the program in which you are working. The following options appear on various **Edit** menus throughout the program.

Change Password. When you select **Change Password** from the **Edit** menu, the Password screen appears. If you have security rights, you can change your password from anywhere in the program. For more information about changing passwords, see "Changing Passwords" on page 56.

> **Note:** Deleted records cannot be recovered without restoring to a backup.

Undo. When you select **Undo**, the previous action is reversed. For example, you can restore deleted text; however, you cannot undo a deleted record. The keyboard command for **Undo** is CTRL + Z.

Cut. When you select **Cut** with text highlighted, the text is removed from the record and placed on the *Windows* clipboard where you can paste elsewhere. The keyboard command for **Cut** is CTRL + X.

Copy. When you select **Copy** with text highlighted, the text is copied from the record and placed on the *Windows* clipboard where you can paste elsewhere. The keyboard command for **Copy** is CTRL + C.

Paste. To paste previously cut or copied text into a selected field or grid, place your cursor in a field or grid and select **Paste**. The keyboard command for **Paste** is CTRL + V.

Delete. You can use **Delete** to delete highlighted text. The keyboard command for **Delete** is the DELETE key.

Insert Row. When you select **Insert Row** while the cursor is in an editable grid, a row is inserted above the currently-selected row. Use this command to enter information in hierarchical order.

Delete Rows. When you choose **Delete Rows** while the cursor is in an editable grid, the selected row(s) are deleted.

Select Row. When you choose **Select Row** while the cursor is in an editable grid, the row in which the cursor is located is highlighted.

Select All Rows. When you choose **Select All Rows** while the cursor is in an editable grid, all rows are highlighted. The keyboard command for **Select All Rows** is CTRL + A.

Export Grid. When you select **Export Grid** while the cursor is in a grid, information in the grid is exported to another file location.

Export Grid to Excel. When you select **Export Grid to Excel** while the cursor is in a grid, the grid is exported to *Excel* if you have Microsoft *Excel* installed.

Find. When you select **Find** while the cursor is in a box listing field name entries, the Find screen appears. You can use **Find** to find a specific field in a grid containing numerous entries. By using the Find screen, you can quickly find an entry instead of spending time scrolling through entries. For more information, see "Using Find" on page 24. The keyboard command for **Find** is CTRL + F.

Annotate. When you select **Annotate**, the Annotate screen appears. You can then create an annotation for the record, which can be useful as a reminder of an important situation or condition regarding that record. The keyboard command for **Annotate** is CTRL + T.

View Menu

With the **View** menu you can determine your "view" of the screen. You can select to see the navigation bar, page heading, navigation tabs, and status bar. Options on the **View** menu change when accessed from different areas of the program. The following options appear on various **View** menus throughout the program.

Navigation bar. The navigation bar provides links to all areas of the program you are currently in and is located on the left side of the shell by default. This bar contains links to all main areas of the program. When you click a link, that area appears as a page in the shell. You can hide the navigation bar or move it to the top, bottom, left, or right side of the shell. To move or hide the navigation bar, place your cursor over the navigation bar, right-click your mouse, and select an alignment from the shortcut menu.

Page heading. You can hide or display the page heading that appears below the action bar. The page heading shows you where you are in the program at all times. You can hide the page heading or move it to the top, bottom, left, or right side of the shell. To move or hide the page heading, place your cursor over the page heading, right-click your mouse, and select an alignment from the shortcut menu.

Navigation tabs. You can hide or display the navigation tabs that appear by default on the right side of certain screens. You can hide the navigation tabs or move them to the top, bottom, left, or right side of the shell.

Toolbar. You can hide or view the toolbar.

Status bar. You can hide or view the status bar.

Columns. This menu item is enabled only when your cursor is in a grid with changeable columns. When you select **Columns**, the Define Column Order screen appears so you can arrange the columns in the order you want them to appear in the grid. In grids with changeable columns, you can also click and drag a column header to move it.

Go Menu

The **Go** menu provides another way of navigating the program. For example, if you hide the navigation bar, you can still access those shortcuts from the **Go** menu. You can also move **Forward** and **Back**, and quickly access different areas of the program.

Record Menu

The title of this menu changes according to the record type. For example, the title is **Account** if selected from an account record, or **Invoice** from an invoice record. This menu contains common options, as well as options specific to the record you have open. The following common options appear on various **Record** menus throughout the program.

First. When you select **First**, the first record of that type in your database opens. Depending on the type of record, "first" refers to records listed alphabetically or numerically.

Previous. When you select **Previous**, the record appearing alphabetically or numerically immediately before the current record opens.

Next. When you select **Next**, the record appearing alphabetically or numerically immediately after the current record opens.

Last. When you select **Last**, the record appearing last alphabetically or numerically opens.

Go to <Record Type>. When you select **Go to <Record Type>**, the corresponding <Record Type> screen appears. Not all records have the **Go to** option.

Restore Default Description. When you select **Restore Default Description**, the program recalculates and applies the default account description to the current account. This option is available only on account records.

Duplicate Search. When you select **Duplicate Search**, the program searches for duplicate records within your organization's database.

Load Defaults from. When you select **Load Defaults from**, the Field default sets screen appears. From this screen, you can apply saved default sets or create new ones to apply.

Favorites Menu

Select the **Favorites** menu to create links to items you use most often or want to access quickly. These links are called favorites. You can designate any saved record (including accounts, queries, imports, and reports) as a favorite. You can also create links to Web pages you access most frequently. You can place favorites on the **Favorites** menu, the Home page of a program, or the navigation bar. You can create folders of favorites and shortcut groups to organize the records and pages you use for a particular task.

The following selections appear on various **Favorites** menus throughout the program. For more information about adding and organizing favorites, see "Using Favorites" on page 46.

Add to Favorites. When you select **Add to Favorites** from the **Favorites** menu of an open record, you add the record to your favorites. From the New Favorites screen, you also determine where you want the favorite located — on the **Favorites** menu, the Home page of the programs, or the navigation bar.

> **Note:** Favorites placed on the navigation bar or **Favorites** menu can be accessed from any page in the program and from most screens.

Organize Favorites. When you select **Organize Favorites** from the **Favorites** menu, the Organize Favorites screen appears. On this screen, favorites are organized in folders. There are pre-established folders for the **Favorites** menu, the Home page, and the navigation bar. Within each of the folders for these locations, you can create additional folders; move favorites from one folder to another; and copy, edit, and delete favorites and folders. You can also specify the order in which favorites appear in a folder.

Add Page to Favorites. When you designate a page as a favorite using **Add Page to Favorites**, you create a direct link to that page from the **Favorites** menu, the Home page, or the navigation bar. Using these links can make navigating through the program easier and more efficient.

Tools Menu

From the **Tools** menu you can access and define options, create default settings, activate optional modules, and if you have the optional module *Financial Edge: VBA*, you can customize the software using *Visual Basic for Applications*. The following options appear on various **Tools** menus throughout the program.

Organize/Create Defaults. Select **Organize/Create Defaults** to access the Defaults screen where you can create and organize defaults and default sets.

Options. Select **Options** to customize the look of screens and establish a wide variety of default values. Options are user-specific.

> **Note:** *Visual Basic for Applications* is an optional module you can use to customize Blackbaud software for your organization's needs. For more information about *Financial Edge:VBA*, contact our Sales Department at solutions@blackbaud.com.

Visual Basic for Applications. Select **Visual Basic for Applications** to customize the program.

Run Macro. Select **Run Macro** to run macros created in *VBA*.

Unlock Add-on Modules. Select **Unlock Add-on Modules** to unlock any optional modules your organization purchases. To unlock an optional module, you must enter the unique activation key that comes with the module; then the module is ready to use.

Help Menu

The **Help** menu provides access to the different sources of information available to assist you in using the program. **Help** includes user guides and help files, plus links to support resources on the Blackbaud website. From the **Help** menu, you can also check to see the version of the software you are using. The following options appear on the **Help** menu throughout the program.

> **Note:** You must enter your user name and password to access Support resources on the Blackbaud website.

Help Topics. When you select **Help Topics**, the help file opens. For more information about the help file, see "Finding Help" on page 151.

User Guides. When you select **User Guides**, a page appears with links to the user guides available for the program in which you are currently working. When you click a link on the page, the user guide opens in PDF format in a browser window. You can save or print the guide. To search the guide for a specific word or phrase, press **CTRL+F** to open the Find screen. Enter the word or phrase and click **Find**.

Knowledgebase. When you select **Knowledgebase**, the Blackbaud website opens to our Knowledgebase where you can search for answers to your software questions.

Frequently Asked Questions. When you select **Frequently Asked Questions**, the Blackbaud website opens to our FAQ Library where you can find answers to the most frequently asked questions about your software.

Online Support. When you select **Online Support**, the Blackbaud Support website opens where you can search Knowledgebase, check the status of existing cases or find additional support resources.
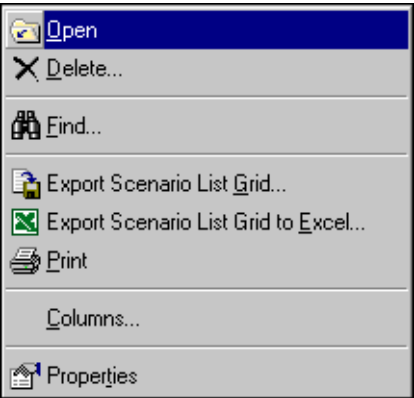
> **Note:** We have renamed the **Case Central** menu option to **Online Support**. If you have not installed the latest patch, you will still see the **Case Central** option. When you select **Case Central**, the Blackbaud website opens to Case Central where you can check on the status of existing cases.

About. When you select **About <Program Name>**, you can learn helpful information about the specific program you are using, including the version number, serial number, and other registration information. Click **System Info** for complete information about your system.

Right-Click Shortcut Menus

Note: You can also access a right-click shortcut menu by pressing **SHIFT + F10**.

You can access commonly used commands by placing the cursor in a box or grid and right-clicking the mouse. Available commands vary depending on where you are in the program. Common right-click commands include **Open**, **Find**, **Export**, and **Print**.

```
📁 Open
✕ Delete...
🔍 Find...
📋 Export Scenario List Grid...
📗 Export Scenario List Grid to Excel...
🖨 Print
   Columns...
📑 Properties
```

Buttons

Buttons quickly perform functions, such as saving, without using the menu bar. Some buttons contain a down arrow that provides access to additional options. For example, when you click the down arrow beside the **Save and Close** button, the **Save and New** button becomes visible. Buttons are located on the toolbar and screens. Some buttons are available only in certain areas of the program while others are found throughout the interface. If you have the tooltips option set in Options, you can move your cursor over a toolbar button to view its function. These are some common buttons found throughout the program:

Search for data to enter into a field

Access a list of values associated with that field

Increase or decrease numbers in a field

Browse the system to select the correct path and file name

Edit a query design

Search for account number segments

Open a calculator for easy entry of amounts in currency fields

Open a calendar to help locate the correct entry for date fields

Move selected item to frame on the right

Move all items to the frame on the right

Move selected item to frame on the left

Move all items to the frame on the left

Function Keys

You can use function keys to help speed your data entry and access information. The status bar at the bottom of a screen indicates when a function key is available.

F1	The **F1** key opens to the help file. Press this key from any point in the program to access context-sensitive help.
F2	The **F2** key inserts the default value of a field into the current record. A message on the status bar at the bottom of the screen indicates default fields.
F3	In date fields, **F3** inserts the current date.
F4	The **F4** key displays the list of table entries in a drop-down field.
F5	The **F5** key refreshes grids and the bank register. You can also press it to add a timestamp to a notepad.
F7	The **F7** key accesses table lookups. This key also accesses a calendar in date fields and a calculator in currency fields.

Selection Boxes

Selection boxes are commonly used to select fields or records to include in a group.

To move an item from one box to another, select the item and click a single arrow button or double-click the item. To move all the items from one box to another, click a double arrow button. The following selection box is from a security user record in *Administration*.

Tree Views

Tree views are hierarchical lists used throughout our software. They differ from standard lists in that items in a tree view contain branches represented by dotted lines. Tree views are usually found on the left side of the screen. When you select an item or branch in a tree view, options for that item appear on the right.

Some tree views automatically display all branches; for others you must click a plus sign to view the branches. The following tree view appears in the *Visual Chart Organizer* in **General Ledger**.
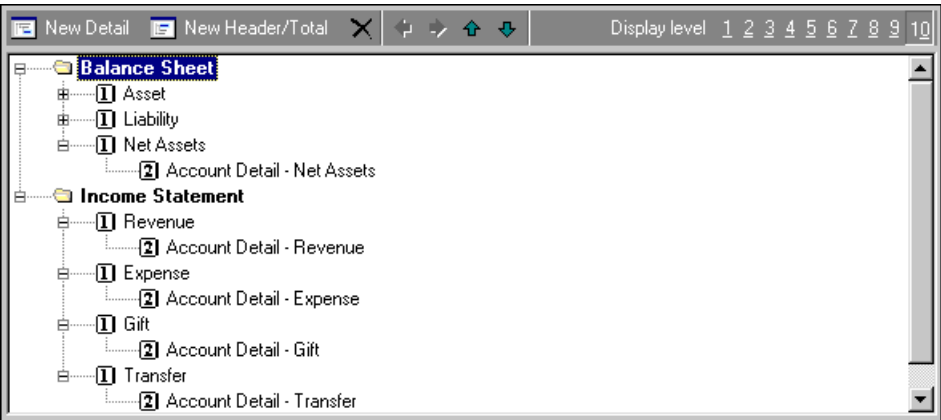
Tables

Tables are fields that contain predefined entries. Selecting information from a table can make entering your data quick and consistent. Instead of typing an entry manually, you can simply select the entry from a list.

In some cases, such as the **State** table, the entries are predefined. For most tables, however, you can define table entries if you have security rights. You can add or edit table entries from some fields on records tabs. Tables and table entries are discussed in detail in the *Configuration Guide* designated for each program. You can access table entries using five methods.

▼	A down arrow next to a field indicates a table lookup is available. Click the arrow to access a list of entries for the field.
Arrow Keys	Place the cursor in a field and press the up or down arrow key on your keyboard to scroll through the entries.
Typing	Typing an entry into a field is another way to access an entry. If the entry you type does not exist in the table, the program displays a message asking if you want to add the new table entry. Click **Yes** to add the new entry.
F7	Pressing **F7** also accesses tables. The message "Press **F7** for Table Lookup" appears on the status bar when a table is available.
Field name	Field names for fields with table values turn blue when you move your mouse over the field name. Click the field name to access the table.

▶ **Editing table entries**

If you have security rights, you can add, edit, and delete entries for tables.

Tip: For ease of data entry, mark **Automatically complete table entries** on the General Tab of the Options screen. If this checkbox is marked, the program automatically completes the remaining part of a table entry when you start typing it. For more information, see "General" on page 66.

1. With the cursor in a field with a table, press **F7**. A screen similar to the following Cash Flow screen appears.
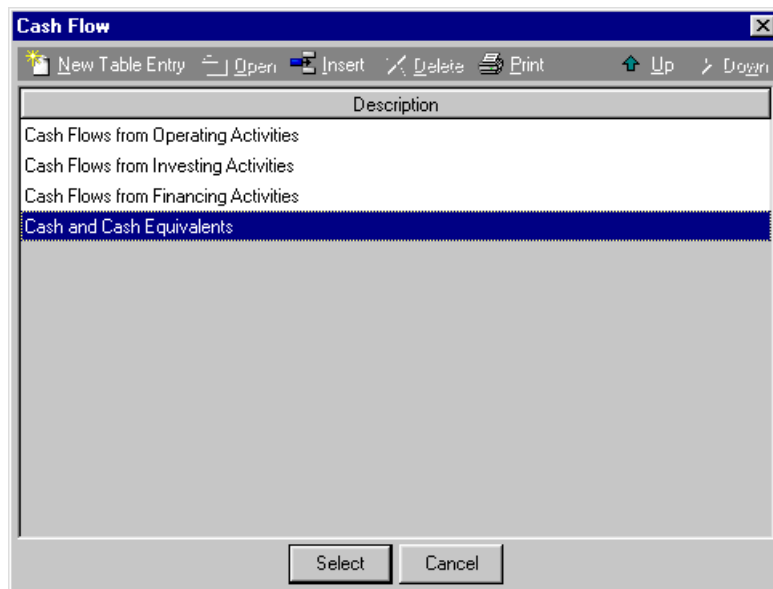
On this screen you can click buttons on the action bar to add new entries, open and edit existing entries, insert a new entry at a specified point in the list, or delete entries. You can also move entries up or down in the list and print a list of table entries for your records.

2. Select the entry you want to edit and click **Open** to make your changes.

3. Click **OK** to save your changes and return to the field.

Filtering Criteria

Note: A filter is a requirement that records must meet to be included in a query, report, mailing, template, or other grouping.

For many applications, you can filter the information included in transactions or reports. Filtering narrows information to only that which you need. For example, to run an open invoice report and include only invoices with a post status of Not yet posted, filter by Post Status on the Filters tab. Only invoices with a post status of Not yet posted recorded in the **Post Status** field of the invoice record appear on the report. Invoices with a post status other than those selected do not appear on the report. For information about filters for a specific report or transaction, see the corresponding reports guide.

On the Filters tab, you can include selected filters, a range of filters, or filters from an output query. The following procedures explain how to filter using these methods.
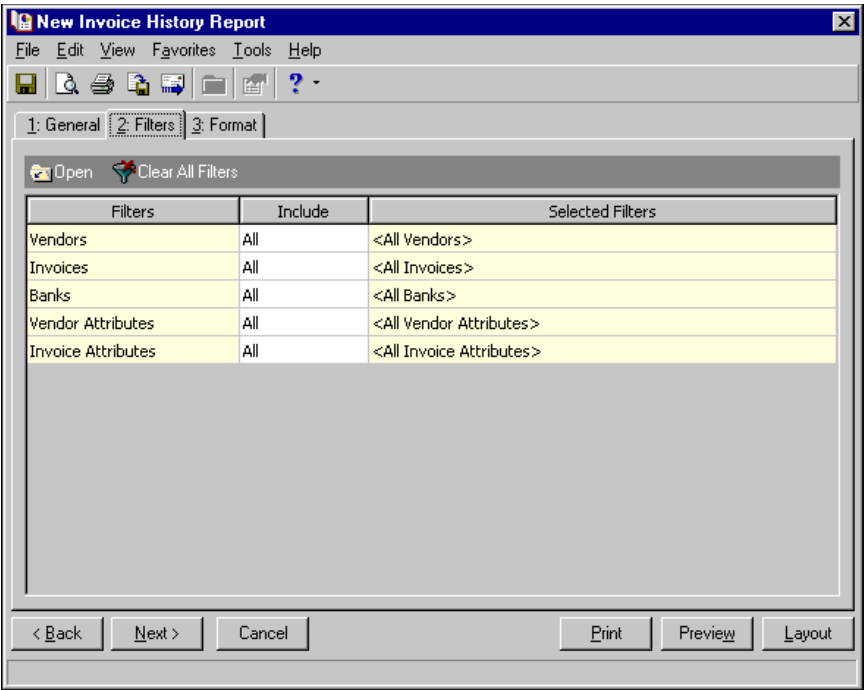
Selected Filters

When you filter using Selected filters, a screen with a grid or selection box appears depending on the type of criteria you are filtering.

The following procedures describe how select filters on the grid and selection box screens. You can use these same basic steps to filter any report or transaction in the program.

‣ **Filtering by selected criteria using a grid screen**

Although this procedure describes how to filter an invoice report in *Accounts Payable* by vendor, the basic process is the same when filtering by selected criteria in other areas.

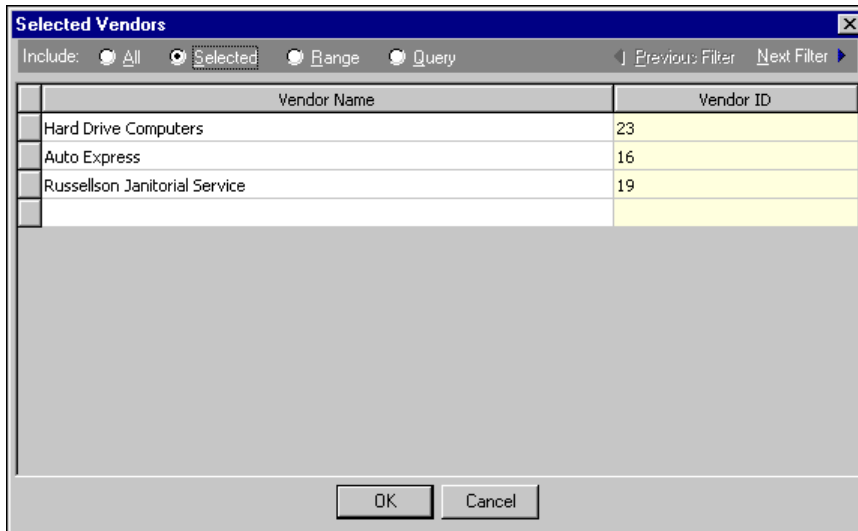1. From an invoice report, select the Filters tab.

Note: The Selected <Filters> screen varies according to the filter you select.

2. In the **Include** column in the **Vendors** row, select "Selected". The Selected Vendors screen appears.

On this screen, you can include selected vendors, a range of vendors, or a previously created query of vendors. Depending on your selection, different fields appear.
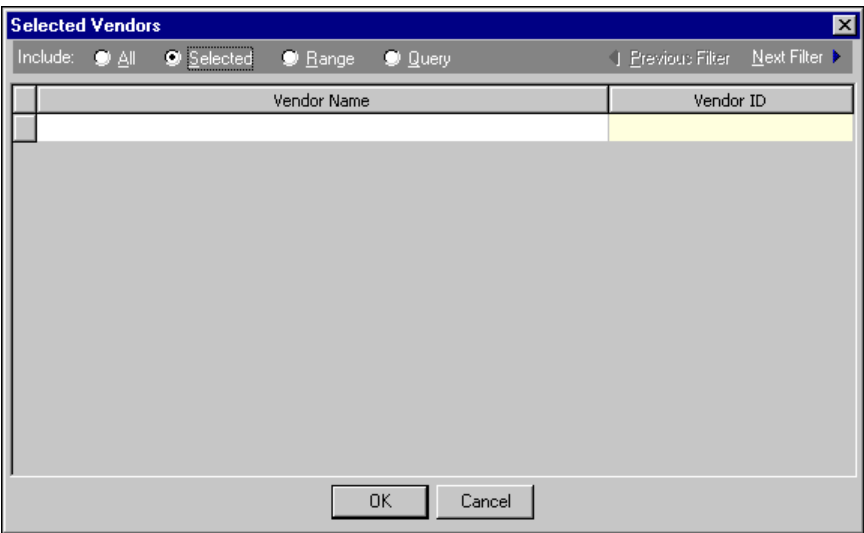
Tip: If you know the vendors you want to use, you can enter them directly into the fields without having to search. You can enter the first few letters of a vendor name and click **TAB**. If the name is unique, it appears automatically. If the letters match several vendors, an Open screen appears so you can select the correct vendor.

3. Mark **Selected**. Enter a vendor name in the **Vendor Name** column or click the binoculars to access the Open screen to search for a vendor. For more information about the Open screen, see "Finding and opening a record" on page 27. To select additional vendors, press and hold the **CTRL** key while clicking each vendor to include. For a range, select the first vendor, press and hold the **SHIFT** key while choosing the last vendor.

4. Click **OK**. You return to the Filters tab. The vendor name now appears in the **Selected Filters** column in the **Vendors** row.
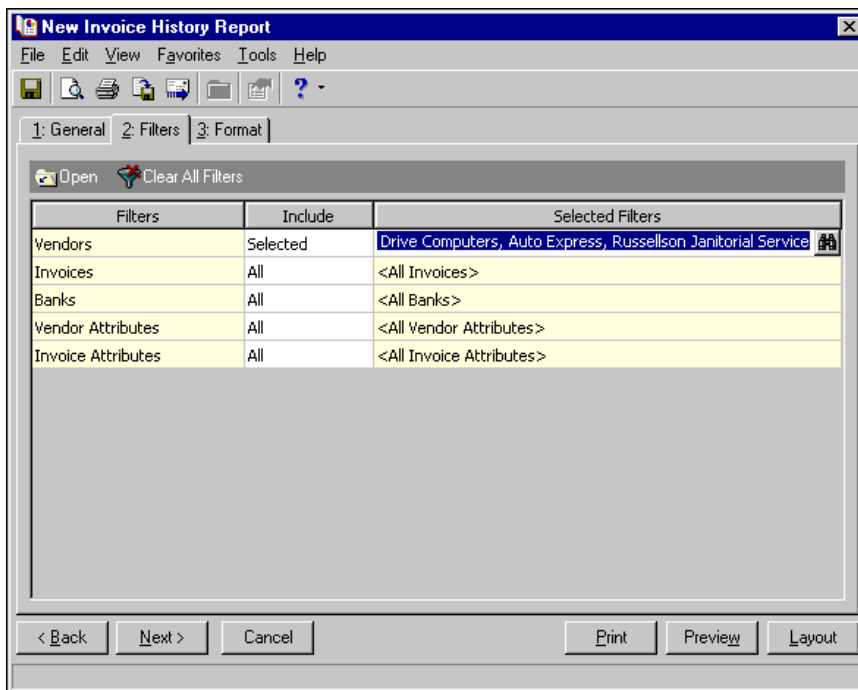
▶ **Filtering by selected criteria using a selection box screen**

Although this procedure describes how to filter an invoice report in *Accounts Payable* by bank, the basic process is the same when filtering by selected criteria in other areas.
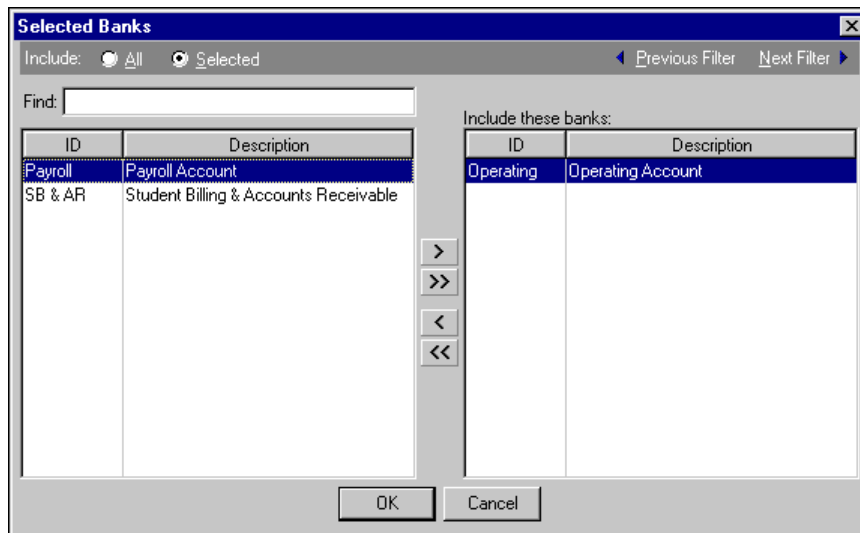
1. From an invoice report, select the Filters tab.
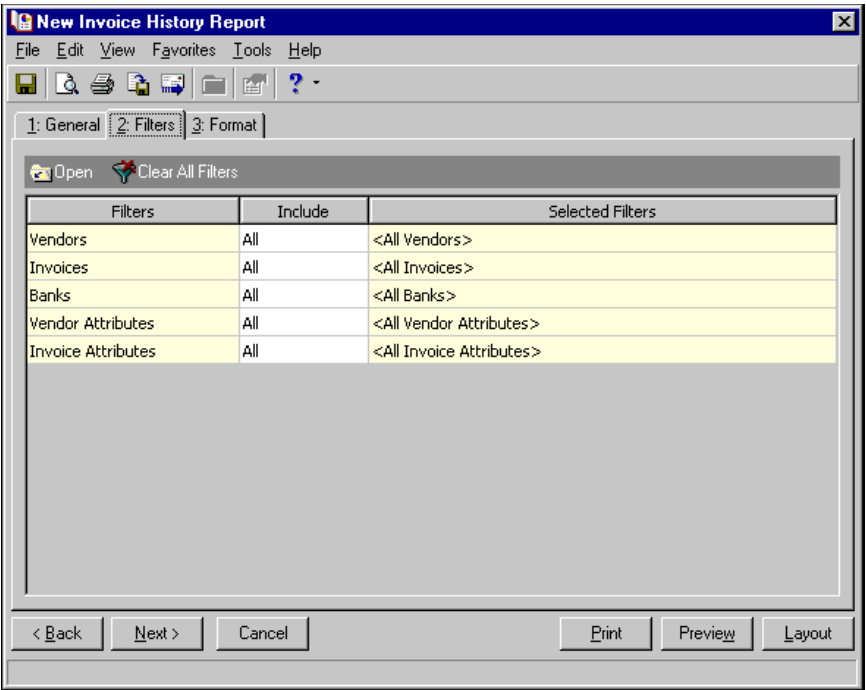
**Note:** The Selected <Filters> screen varies according to the filter you select.

2. In the **Include** column in the **Banks** row, select "Selected". The Selected Banks screen appears.
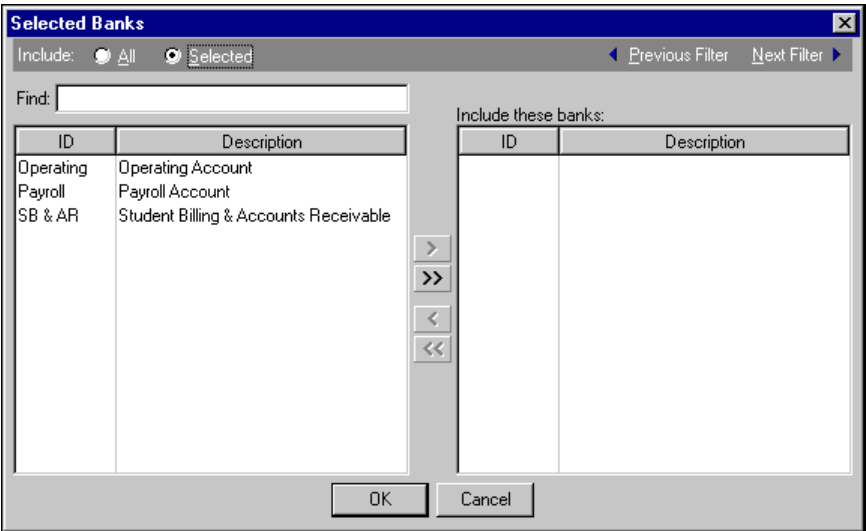
3. Select the bank account to filter by and click the single right arrow button. The bank appears in the **Include these banks** box.

4. Click **OK**. You return to the Filters tab. The bank account name appears in the **Selected Filters** column in the **Banks** row.
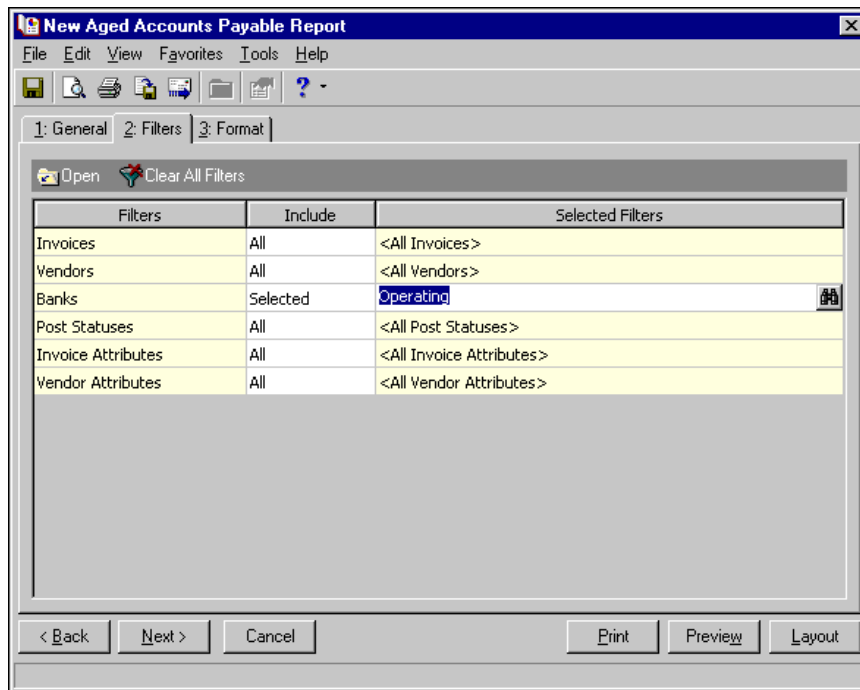
Range of Criteria

For many filters, you can designate a range of criteria to include in a report. Creating a range is a quick way to select multiple filters of the same type rather than selecting each filter individually.

‣ **Filtering criteria in a range**

Although this procedure describes how to filter an account report in *General Ledger* by a range of accounts, the basic process is the same when filtering by selected criteria in other areas.

1. From an account report, select the Filters tab.
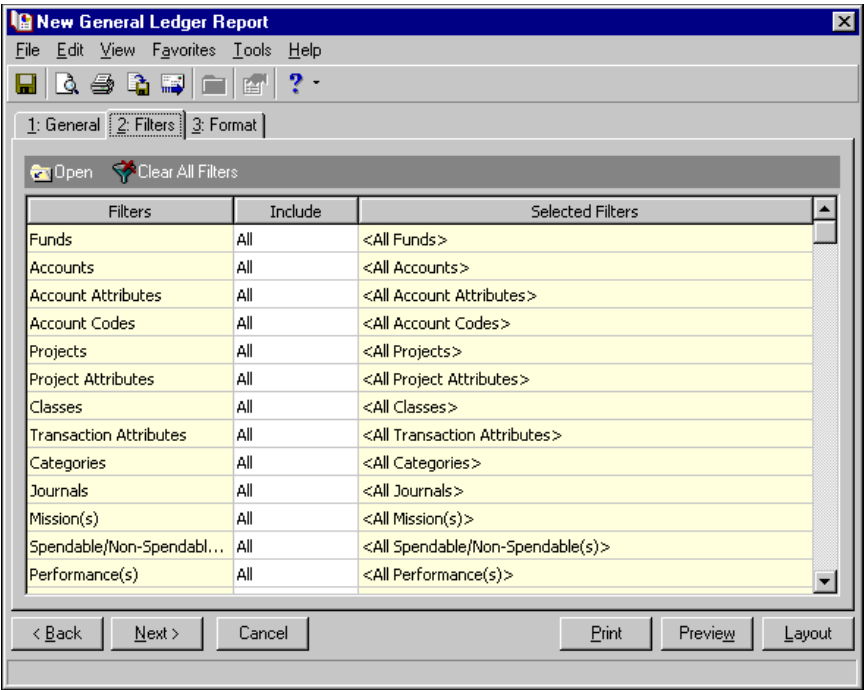
2. In the **Include** column for the Accounts filter, select "Selected". The Selected Accounts screen appears.

3. Mark **Range**.
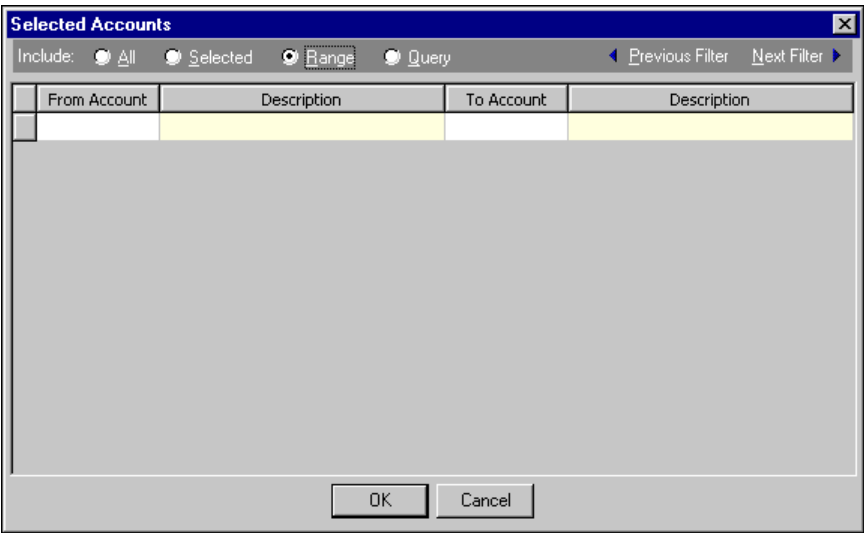
Tip: If you know the accounts you want to use, you can enter these directly into the fields without having to search.

4. In the **From Account** column, enter the first account in the range or click the binoculars to access the Open screen to search for an account. For more information about the Open screen, see "Finding and opening a record" on page 27.

5. In the **To Account** column, enter the last account in the range or click the binoculars to search for it.

6. Click **OK**. You return to the Filters tab. The selected range of accounts appears in the **Selected Filters** column on the Accounts row.


Output Query of Filters

On the Filters tab, you can select to filter by records using a saved output query. You can also create a new query to use again in another area of the program.

▶ **Filtering criteria using an output query**

Although this procedure describes how to filter an account report in *General Ledger* using an output query of accounts, the basic process is the same when filtering by selected criteria in other areas.

  1. From an account report, select the Filters tab.
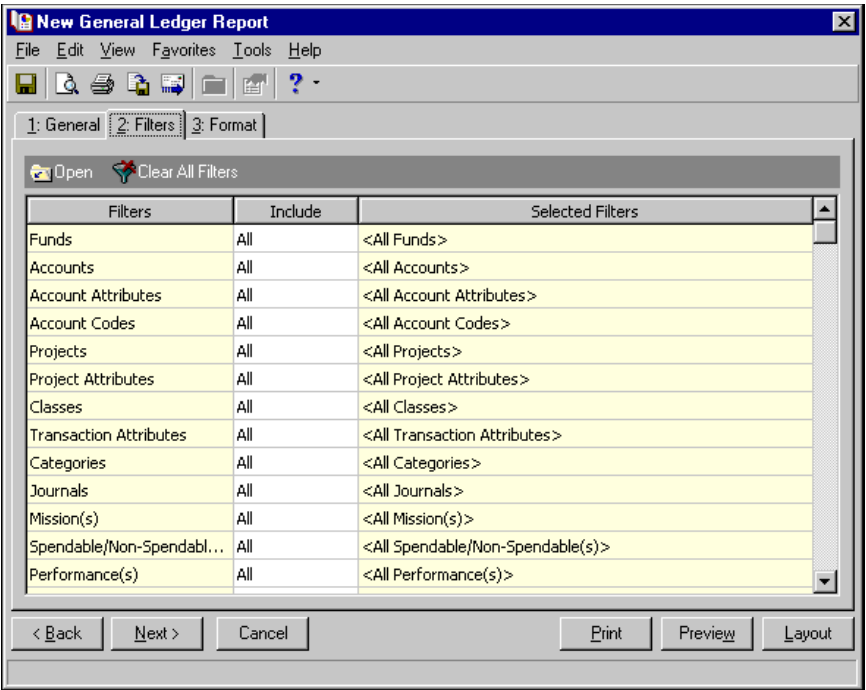
  2. In the **Include** column for the Projects filter, select "Selected". The Selected Projects screen appears.

  3. Mark **Query**.
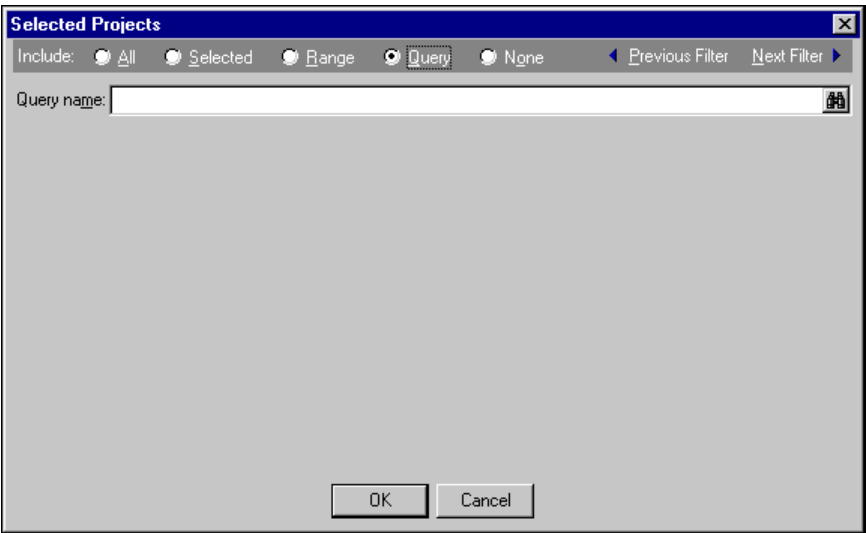
Tip: If you know the name of the query you want to use, you can enter it directly into the field without having to search.

4. In the **Query name** field, enter a query name or click the binoculars to access the Open Query screen to search for a saved query. For more information about the Open screen, see "Finding and opening a record" on page 27.

5. Click **OK**. You return to the Filters tab. The selected range of accounts appears in the **Selected Filters** column on the Accounts row.
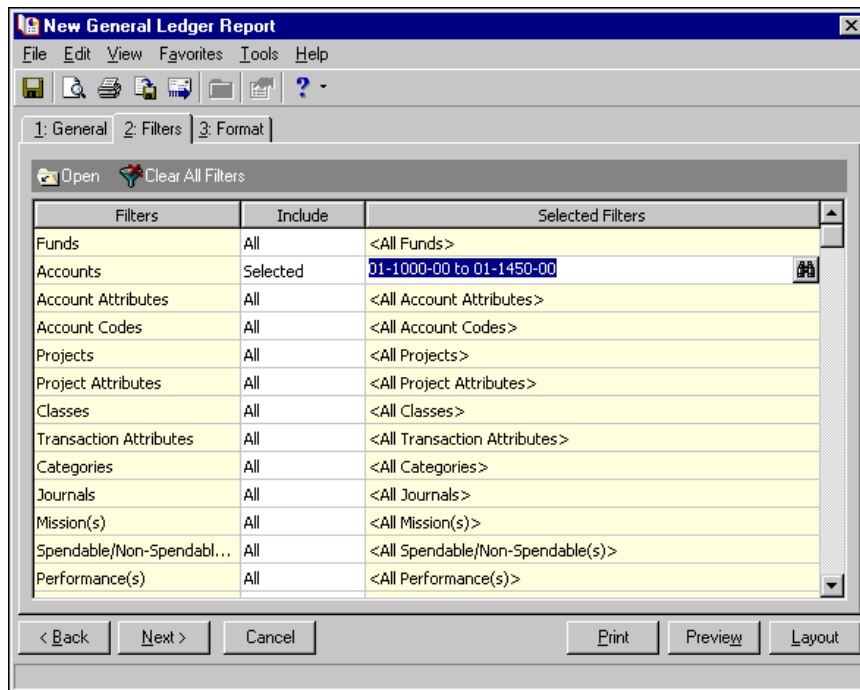
Sorting Information

You can sort information in lists and grids throughout the interface. You can sort information efficiently on the Columns screen and in a grid. The following procedures walk you through the different methods of sorting lists and grids.

Sorting Lists

You can use the sort screen to sort lists of items. For example, if you have security rights to add and edit table entries, you can sort the order in which table entries appear. For lists with numerous entries, you may want to sort the order alphabetically to help find particular entries quickly.

▶ **Sorting a list**

Sorting options vary for lists. Some lists are sorted by clicking a **Sort** button while others have a **Sort** option on the action bar. For this procedure, we sort the entries in the **State** table.

1. From the navigation bar, select *Configuration*. The Configuration page appears.

2. Select **Tables**. The Tables page appears.

3. In the column on the left, select **State**.
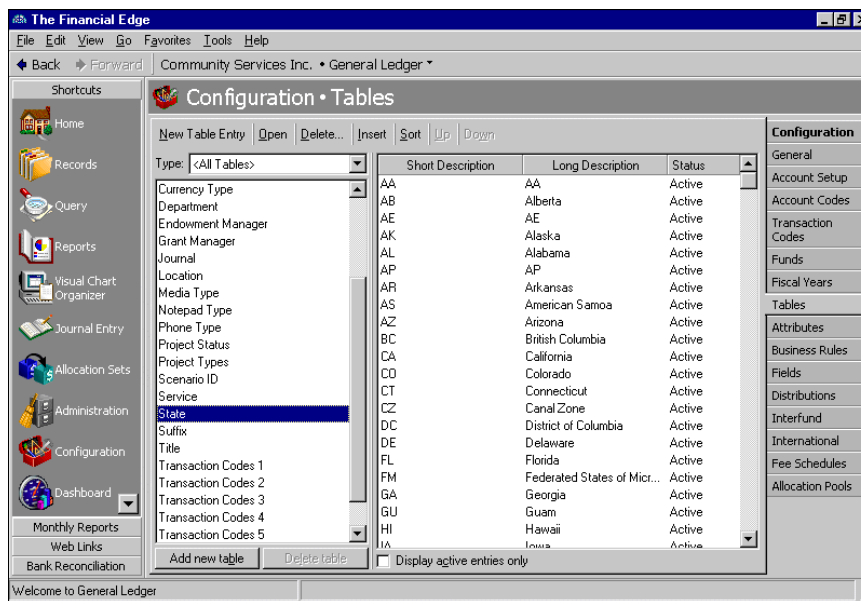
4. Click **Sort**. The Sort Table Options screen appears.
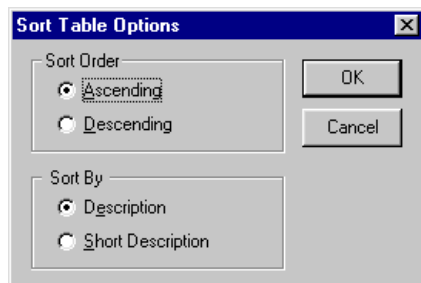
5. In the **Sort Order** frame, mark **Ascending** to sort in alphabetical order, or mark **Descending** to sort in reverse order from Z to A.

6. In the **Sort By** frame, mark **Description** to sort table entries by long descriptions, or mark **Short Description** to sort by short descriptions.

7. Click **OK** to save your changes.

Sorting Information in Grids

You can also sort the information in a grid. You can sort columns, such as **Date added**, **Description**, and **Status**, in ascending or descending order. Columns vary, depending on the grid you have open.

▶ **Sorting information in a grid**

Note: Sorting information that appears under a grid heading can help you organize a list.

1. In the grid on the Journal Entry page, click the **Date added** column heading. The list sorts in ascending order with the oldest date at the top.

2. Click **Date Added** again and the order reverses to descending order, with the oldest date at the bottom.

3. Click any other heading to reverse the sort order of the grid. When you click the heading, an arrow appears showing the direction in which the information is sorted.

Sorting Columns on a Screen

You can sort and hide columns on a screen to include or exclude specific columns of information. This is especially helpful for hiding columns your organization does not use.

▶ **Sorting and hiding columns on a screen**

Although this procedure describes how to sort and hide columns on the Journal Entry page in *General Ledger*, the basic process is the same in other areas.

1. From the Journal Entry page of *General Ledger*, right-click in the batch grid and select **Columns** from the shortcut menu. The Columns screen appears.
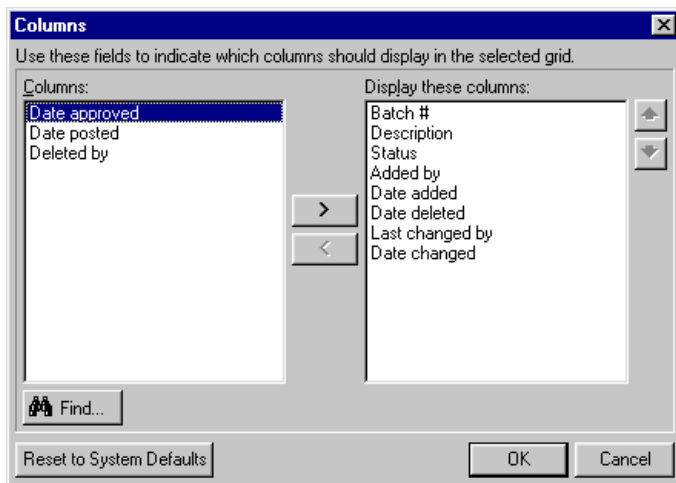
2. In the **Columns** box, select a column name and click the right arrow to move it into the **Display these columns** box. Repeat this step for each column types you want to display.

3. To sort the order of the columns, select a column and click the up and down arrow buttons.

4. To return to the original default settings, click **Reset to System Defaults**.

5. Once you complete sorting the columns, click **OK** to return to the previous main screen.

Using Find

The **Find** button is available in many areas of the program to help you locate specific fields or items from a list in a box or grid. It prevents you from having to scroll through lists with many entries that are not visible at the same time in the box or grid.

▶ **Finding a field**

1. On the action bar of a screen with a grid or box, click **Find**. The Find screen appears.

2. From the **Field** drop-down list, select the field you want to find.

3. In the **Find what** field, enter the name of the entry you want to find. If you are unsure of the spelling, you can use the wildcard character (*) for part of the entry.

4. In the **Match** field, select what your entry in the **Find what** field should match: "Any part of field", "Whole field", or "Start of field".

5. If you want the search to match upper or lower case in the field name, mark **Match case**.

6. When you click **Find First**, the first matching field is highlighted in the box or grid.

7. To find additional entries that meet your criteria, click **Find Next**.

8. To exit the Find screen, click **Close**.

Searching for Records

To find and open a record, you can use the Open screen. On the Open screen, you search for a record based on criteria you define. You can use it to search for a particular record or group of records.

The interface provides multiple ways to access the Open screen depending on your location in the program. You can select **File**, **Open** on various screens, click the **Open** button on the toolbar, or select a link to open a specific record type. For example, on the Accounts page select **Open an Account** and the Open screen appears ready to search for and open an account record.

Open Screen Buttons

The various Open screens contain certain common buttons:

Show/Hide Filters. When you click **Hide Filters**, the filter fields are hidden so you can view more search results. You can click **Show Filters** to view the filter fields again.

Clear Filters. When you click **Clear Filters**, the fields are cleared of any previous search entries so you can begin a new search.

> **Note:** The **Previous Filters** button does not appear if you select either to load or refresh the results automatically in miscellaneous search options.

Previous Filters. When you click **Previous Filters**, you can access a previously entered set of filtering characteristics. This saves you from repeatedly entering the same filters each time you need to search for similar records.

Find Now. When you click **Find Now**, the program searches for all records that meet your selected criteria. Those records list in the results grid.

Cancel. When you click **Cancel**, the Open screen closes and you return to the previous main screen.

▶ **Defining miscellaneous search options for records**

To make searching easier on the Open screen, you can set time-saving options on the Miscellaneous Search Options screen.
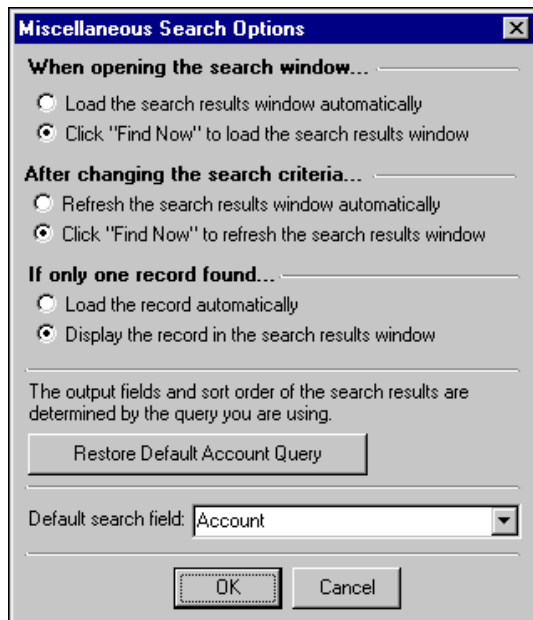
> **Note:** You can also access the Open screen by selecting the **Open a <Record>** link or by selecting **File**, **Open** from any record page.

1. From an open record, select **File**, **Open**. The Open screen appears.

2. On the action bar, click **Options**. The Miscellaneous Search Options screen appears.

3. Mark an option for opening the search results window. To load a search results window automatically when you access the Open screen, mark **Load the search results window automatically**. To manually load results using the **Find Now** button, mark **Click "Find Now" to load the search results window**.

4. Mark an option for refreshing the search results after you change sort criteria. To refresh search results automatically when you access the Open screen, mark **Refresh the search results window automatically**. To manually refresh the results using the **Find Now** button, mark **Click "Find Now" to refresh the search results window**.

5. Mark an option for what to do if only one record is found in the search. To open the record automatically, mark **Load the record automatically**. To display the record in the search results window as usual, mark **Display the record in the search results window**.

6. To restore the default query in the **Search using query** field on the Open screen, click **Restore Default <Record Type> Query**. The default query is the record type only.

7. To select a different default search field, in the **Default search field,** click the down arrow and select a field from the list. This field is contains the cursor when you access the Open screen.

8. Once you complete entering your options, click **OK**. You return to the Open screen.

▸ **Finding and opening a record**

Note: You can also access the Open screen by selecting the **Open a <Record>** link or by selecting **File**, **Open** from any record page.

1. From an open record, select **File**, **Open**. The Open screen appears.

For this example, we selected **File, Open** from an account record. The **Find** field defaults to the type of record from which you accessed the Open screen. In this example, "Account" is the default entry.
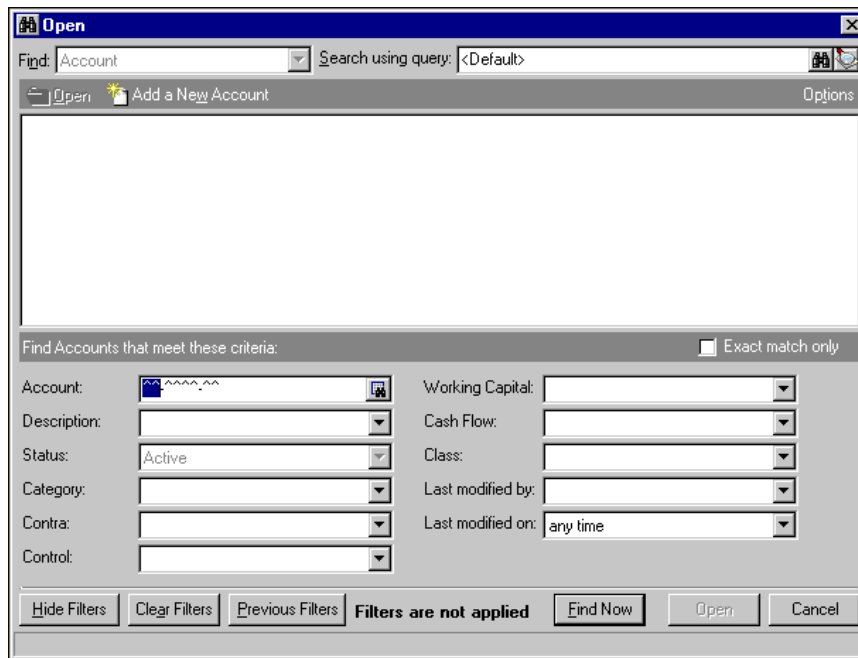
2. In the **Search using query** field, you can click the binoculars to select a query to use for the search or click the magnifying glass to create a new query. You can select the query to use by default on the Miscellaneous Search Options screen.

Note: We recommend that you search by only one or two of the most helpful criteria types because results appearing in the grid must match all criteria you enter. Adding too many criteria in the filter fields can actually prevent you from finding a record.

3. Enter criteria in the filter fields to help narrow your search. The criteria fields change depending on the record type selected. You can enter a value in all fields or no fields, depending on how you want to filter your search.

In text fields, such as **Description**, you can click the down arrow to access your recent entries in the field. You can also use a wildcard character operator in place of a specific character or a series of characters the data must possess to be selected. Wildcards are particularly useful when you are not sure of the spelling of a name or you suspect something is spelled incorrectly. If you mark **Exact match only**, the search finds only records matching whole words you enter. You cannot use wildcards if you mark **Exact match only**.

• Use the question mark to replace a single character. The search finds every possible spelling of the word, substituting one letter wherever you have placed a question mark. For example, if you want to locate records with a description such as "Smith" or "Smyth Trust", but cannot remember the correct spelling, you can use a criteria description like "Sm?th Trust".

Note: You can use more than one question mark in a wildcard search, and you can combine wildcard characters in a search. For example, you can use a description like "Sm?th*" to find records that include "Smith" or "Smyth" followed by a series of characters.

• Use the asterisk to replace a series of characters. For example, you can enter a criteria description like "Smith*" to locate all records that are like "Smith" followed by a string of characters, such as "Trust".

- Use brackets to find a range of values or several specific values. For example, you can use a criteria description beginning with [S-Z] to locate all records with descriptions beginning with any letter in the range S through Z. When you place commas between values within the brackets, the query finds only data with the specific values listed. For example, if you select a criteria description beginning with [A,C,F], the query finds only records with descriptions beginning with an A, C, or F.

4. Click **Find Now**. If the search criteria you enter matches a record in the database, it appears in the grid on the Open screen. If you entered the first few letters or characters in the criteria fields, or used general criteria that apply to several records, more than one record may appear in the grid.

Note: To clear search criteria so you can change the scope of your search, click **Clear Filters**.

5. All records matching the selected criteria appear in the search results grid. In the grid, you can open a record by double-clicking the record or by selecting it and clicking **Open**.

▶ **Finding and opening a record using the Search field**

Tip: To save time when searching for a specific record, you can use the **Search for a <Record> by <ID>** field.

If you know all or part of the record number or ID of a record you want to open, you can use the **Search** field. This field is located on the record page of each record type. This feature saves time because you can open a specific record directly from the record page without using the Open Screen.

1. From the record page, enter all or part of either the record ID or record number in the **Search for a <Record> by <ID>** field.

Whether you should enter a record ID or record number depends on the record type for which you are searching. Depending on the record type, in the **Search for a <Record> by <ID>** field, you enter a record number, a record ID, or the ID or name.
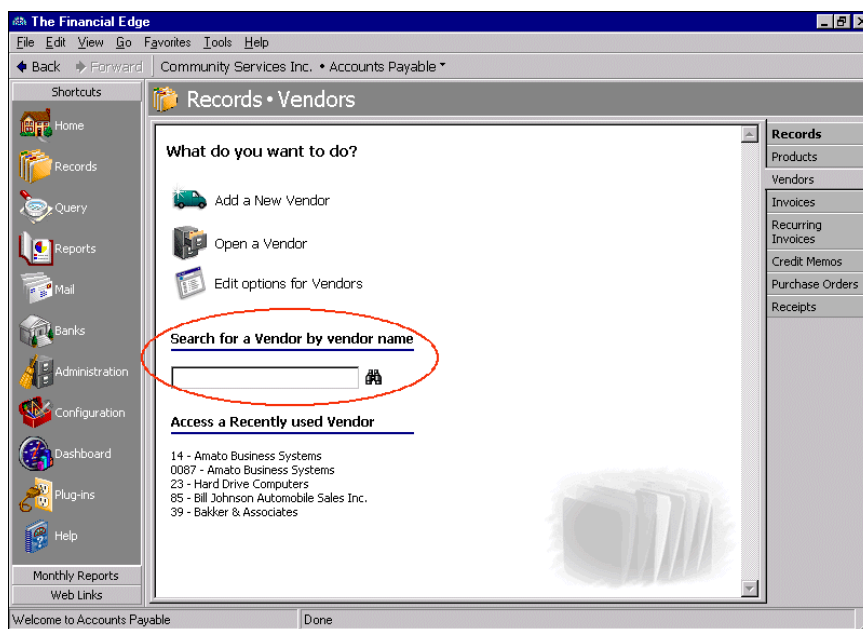
2. Press **ENTER** on the keyboard or click the binoculars. The program locates the record and the <Record Name> screen appears.

If the program is unable to locate the record based on the information entered, a message appears asking if you want to search for the record.

3. Click **Yes**. The Open screen appears. From this screen you can enter filters to help narrow your search. For more information, see "Finding and opening a record" on page 27.

Saving Records

Our programs offer a variety of ways to save records.

*   To save a record as you work — Select **File**, **Save**, click the **Save** button on the toolbar, or press **CTRL + S** on the keyboard.

*   To save and close the current record, and open a new record — Select **File**, **Save and New** or press **CTRL + E** on the keyboard. You can also click the down arrow beside the **Save and Close** button and select **Save and New**.

*   To save and close a record, and return to the main screen for that record type — Select **File**, **Save and Close**. You can also click **Save and Close** on the toolbar or press **CTRL + L** on the keyboard.

Deleting Records

Warning: Deleting permanently removes records from your database. There is no undo for deleted records.

When you delete a record, you completely remove it from your database. To delete an open record, select **File**, **Delete** or click the **Delete** button on the toolbar.

Making Records Inactive

As an alternative to deleting a record, you can make some records inactive if you have security rights. Inactive records do not appear in searches or queries and cannot be associated with other records; however, unlike deleted records, they remain in your database for historic purposes.

▶ **Making a record inactive**

Note: Making records inactive is a good alternative to deleting them. Inactive records cannot be associated with other records.

1. Locate and open a record you want to make inactive.
2. On the main record page, in the **Status** or **Active/Inactive** field, select Inactive.

3. To change the status to Inactive, save the record.

Searching for Duplicate Records

Note: We recommend you set business rules in *Configuration* to automatically check for duplicate records. For more information about business rules, see the *Configuration Guide* for the program.

For certain record types you can establish business rules in *Configuration* to specify duplicate criteria and check for duplicate records automatically. We recommend you establish these business rules before entering any records to help maintain the integrity of your data. For more information about business rules and defining duplicate criteria, see the *Configuration Guide* for the corresponding program.

In *Administration*, you can also search for duplicate records by running duplicate reports. You specify duplicate criteria, run a duplicate record report, and can also create an output query of duplicate records. For more information, see the Administration Basics chapter in the *Administration Guide* for the corresponding program.

You can search for duplicates for these record types:

| General Ledger	Projects, if you have the optional module *Projects and Grants*
Accounts Payable	Vendors, Invoices, and Credit Memos You can also run a utility to merge duplicate vendor records.
Accounts Receivable	Clients, Charges, Credits, Invoices, Payments, and Refunds You can also run a utility to merge duplicate client records.
Cash Receipts	Payments
Fixed Assets	Assets
Student Billing	Students, Individuals, Organizations, Charges, Credits, Advance Deposits, Financial Aid, Billing Schedules, Payments and Refunds
Admissions Office	Applicants, Faculty/Staff, Individuals, Organizations, and Rooms
Registrar's Office	Students, Faculty/Staff, Individuals, Organizations, Courses, and Rooms

While we recommend that you set the business rule to automatically check for duplicate records when saving a new record, you can also search for duplicate records directly from an open record. The duplicate search is based on the duplicate criteria you established in business rules in *Configuration*.

▸ **Searching for duplicate records from a record**

This procedure describes how to search for duplicate invoices from an invoice record in *Accounts Payable*. The steps are essentially the same for each record type that includes a duplicate search.

1. From an open invoice record, select **Invoice**, **Duplicate Search** from the menu bar. The program searches for duplicates.

2. If no duplicates are found, a confirmation message appears stating no duplicate records were found. Click **OK**.

If duplicate records are found, the Duplicate Search Results screen appears.
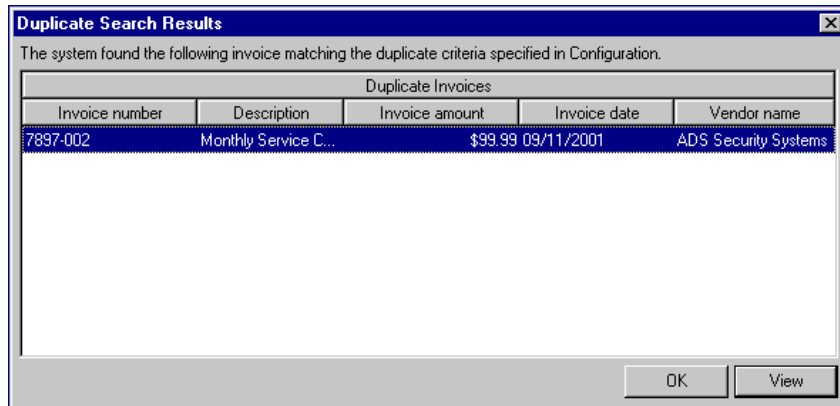
3. To view a record found as a duplicate, select the record and click **View**. The records opens.

4. To close the Duplicate Search Results screen, click **OK**.

Adding Attributes to Records

Note: Attributes are defined in *Configuration* for each record type. For more information about defining attributes, see the *Configuration Guide* for each product.

You can use attributes to add detail to records. When you use attributes, you can group records for reports, queries, and mailings. For more information about using attributes, see the *Records Guide* for each product.

▶ **Adding an attribute to a record**

This procedure walks you through adding a table type attribute to an applicant record in ***Admissions Office***. You can use this procedure as a model for adding attributes to other types of records.

Warning: You cannot delete certain items, such as attributes or table entries, if they are in use on a record.

1. From an open applicant record, select the Attributes tab.

2. In the **Attribute Type** column, select the attribute to add.
3. In the **Description** column, select the value of the attribute
4. In the **Date** column, select the date the attribute was added.
5. In the **Comments** column, you can enter additional comments.

6. To save the record, click **Save and Close**.

Adding Notes to Records

You can use notes to include useful information and messages with your records. For example, you can enter account and project notes on the Notes tab of account and project records.

▶ **Adding a note to a record**

1. From an open record, select the Notes tab.

2. Click **New Note** on the action bar. The New note screen appears. The **Date** field defaults to the current date; however, you can change the date.

3. In the **Title** field, enter a title for this note.

4. In the **Type** field, select the type of note you are entering.

> **Note:** Note types are defined as part of the **Notepad Type** table in *Configuration*. For more information about note types, see the *Configuration Guide* for the program.

5. In the **Author** field, select your user name.

6. In the **Description** field, enter a description of the note, for example, "Contact information". The description is visible on the Notes tab of the record and is helpful if your note is long and detailed.

7. In the notes box, enter any information you want to include with the record, for example, contact information for an organization or bank related to the account.

8. Click **Save and Close** to save your note and close the record.

Using Actions

The Actions tab tracks any tasks or activities you complete for a record. For example, on an asset record, you can include actions for scheduled maintenance, cleaning, or moving an asset. If you have the appropriate security rights, you can add, edit, and delete actions from this tab.

Actions are helpful because you can assign an action to another person, and the program reminds him or her when the action is due. You can also assign actions to yourself. For example, if you must call an auto service center to schedule annual maintenance for a vehicle, you can assign the phone call as an action. When it is time to make the call, the program reminds you by adding an action reminder to the Home page of each program.

▶ **Adding actions to a record**

This procedure walks you through adding an action to an asset record in *Fixed Assets*. You can use this procedure as a model for adding actions to other types of records.

1. From an open record, select the Actions tab.
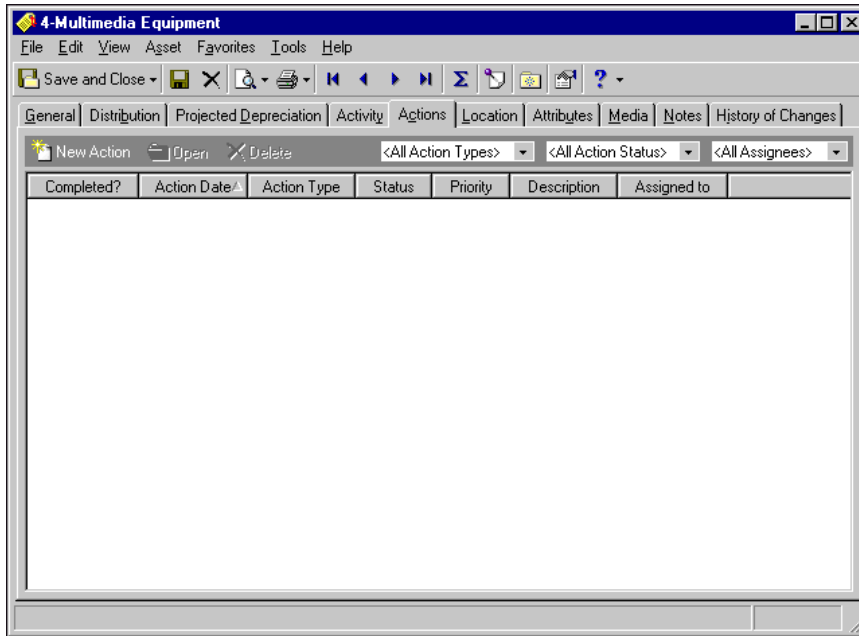
2. Click **New Action** to create a new action. The New Action screen appears on the Actions tab.

3. The **Asset number** field defaults to the assigned number for that asset. The asset ID appears to the right of the field.

4. In the **Action type** field, select type of action. Action types are defined on the Tables tab of *Configuration*.

5. In the **Action date** and **Time** fields, enter a date and time for the action to be completed.

6. In the **Status** field, select an action status. Action statuses are defined on the Tables tab of *Configuration*.

7. In the **Priority** field, select "High", "Normal", or "Low".

8. In the **Assigned to** field, select the person responsible for completing the action.

9. To send the user a reminder, mark **Auto-Remind**. When you mark **Auto-Remind**, the other options in the frame become active.

10. In the **Send reminder to** field, select the user to be reminded.

11. In the **Set reminder for [ ] beforehand** field, specify how many days, weeks, or months before the action date you want to send the reminder.

12. When the action is complete, you can mark **Completed on**, and today's date automatically appears in the field.

13. In the **Description** field, add notes to describe the action.

14. Click **Save and Close**. You return to the Actions tab. The new action appears in the grid.

▶ **Viewing action reminders**

Action reminders are for informational purposes only. You cannot add or edit data on the Action Reminders screen.

Note: You can also view action reminders assigned to you on the Home page of each program.

1. From the shell menu bar, select **View**, **Action Reminders**. The Action Reminders screen appears.
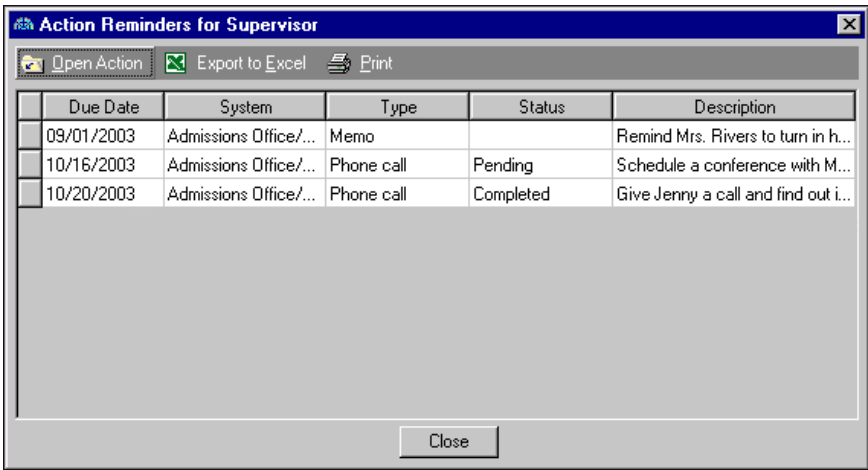

2. To open an action in the grid, select the action and click **Open Action**. The action record appears.

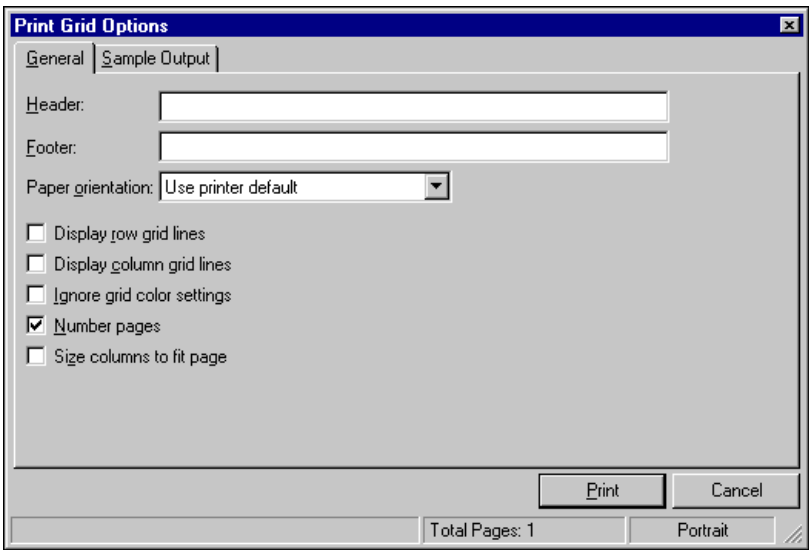To return to the Action Reminders screen, click **Save and Close**.

3. To close the Action Reminders screen, click **Close**.

▶ **Printing action reminders**

1. From the shell, select **View**, **Action Reminders**. The Action Reminders screen appears.

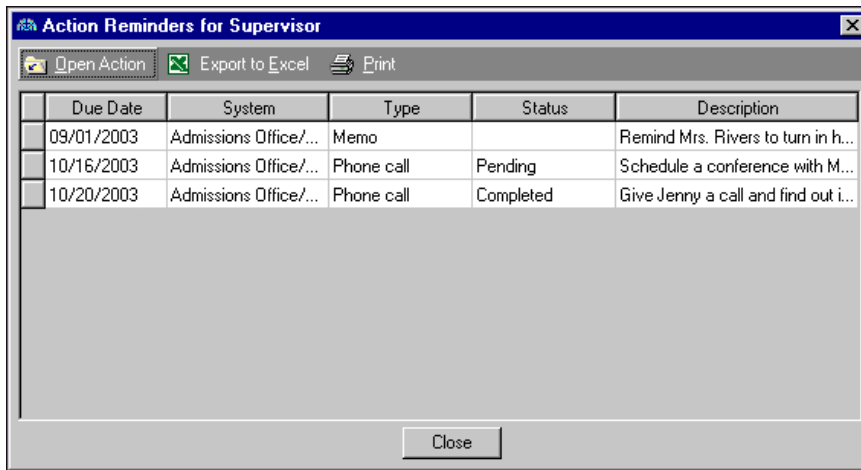2. To print the action reminders, click **Print**. The Print Grid Options screen appears.

3. To select the format of the action reminders printout, complete the Print Grid Options screen. For more information about printing grid options, see "Editing print grid options" on page 58.

4. To print the action reminders and return to the Action Reminders screen, click **Print**.
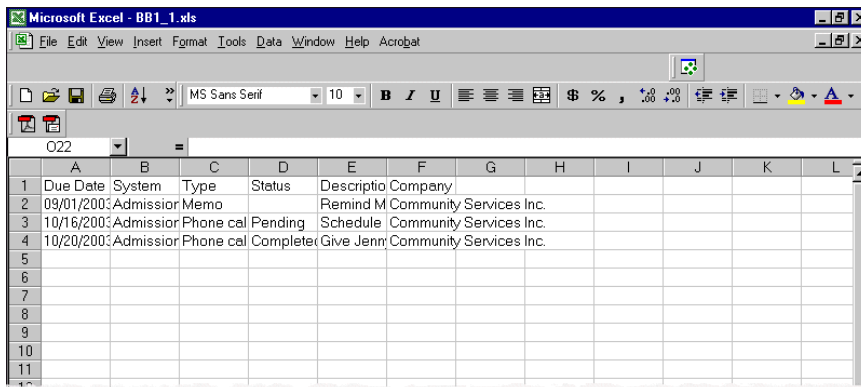
5. To close the Action Reminders screen, click **Close**.

▶ **Exporting action reminders**

1. From the shell, select **View**, **Action Reminders**. The Action Reminders screen appears.

2. To export the action reminders, click **Export to Excel**. A processing screen appears. When processing is completed, *Excel* opens with the exported action reminders.

3. In *Excel*, you can edit, save, or print the action reminders.

Adding Media to Records

On the Media tab you can store media objects about a record. You can create new media objects or browse to files with previously created objects. Media objects can include items such as newspaper clippings, letters, graphs, pictures, and video clips.

▶ **Adding a new media object to a record**

Note: When you add new media, you access applications outside of the program to create the new media object. These objects are saved in the database.

1. From an open record, select the Media tab.
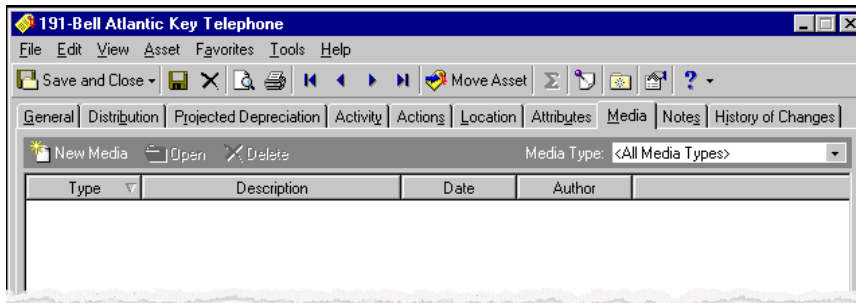
2. On the action bar, click **New Media**. The Insert Object screen appears.

3. To create a new media object, mark **Create New**.

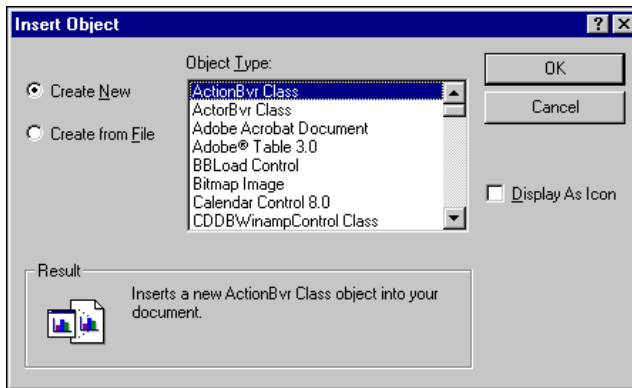4. In the **Object Type** box, select a media object. The object types that appear depend on the applications you have installed.

Note: To display the media object as an icon, mark **Display as Icon**.

5. Click **OK**. The New Media screen for the selected record appears.

6. In the **Date** field, enter the date you add the media object.

Note: Options in the **Types** field are defined on the Tables tab in *Configuration*. You can add new types "on the fly".

7. In the **Type** field, select a media type. You define media types in *Configuration*.

8. In the **Description** and **Title** fields, enter a description and name for the media object. In the **Author** field, select your user name.

Note: If you marked **Display as Icon** on the Insert Object screen, the object icon appears in the bottom frame. If you did not, a blank box appears in the frame.

9. Double-click the icon or box. The application used to create the media object opens. For example, to create a worksheet, Microsoft *Excel* opens.
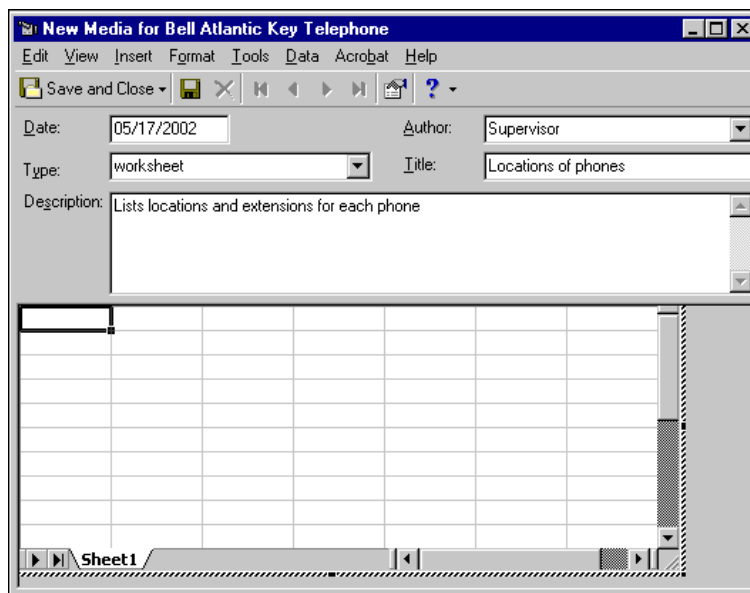
10. Create the media object.

11. Click **Save and Close**. You return to the Media tab, and the media information appears in the grid.

▶ **Adding a media object to a record from a file**

Note: When you create media from a file, you browse to media objects in saved files. If a media object is no longer valid or current, you can access the object and delete it from the Media tab of the record.

1. From an open record, select the Media tab.

2. Click **New Media**. The Insert Object screen appears.
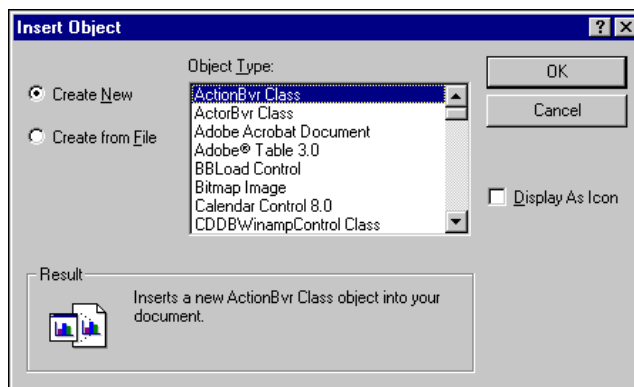
Tip: Mark **Link** so when you make changes to the graphic, those changes automatically appear on the Media tab.

3. Mark **Create from File** to add a media object from a file you previously created and saved. Click **Browse** to search for the file.

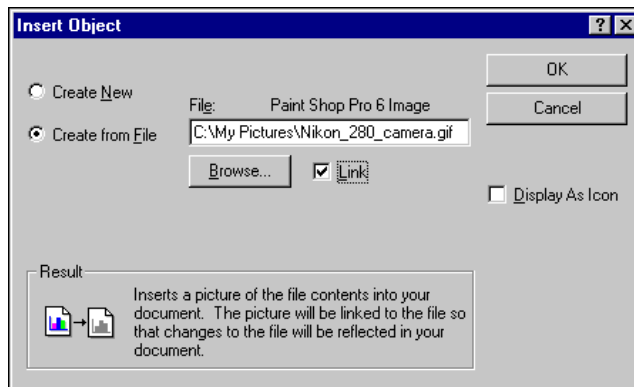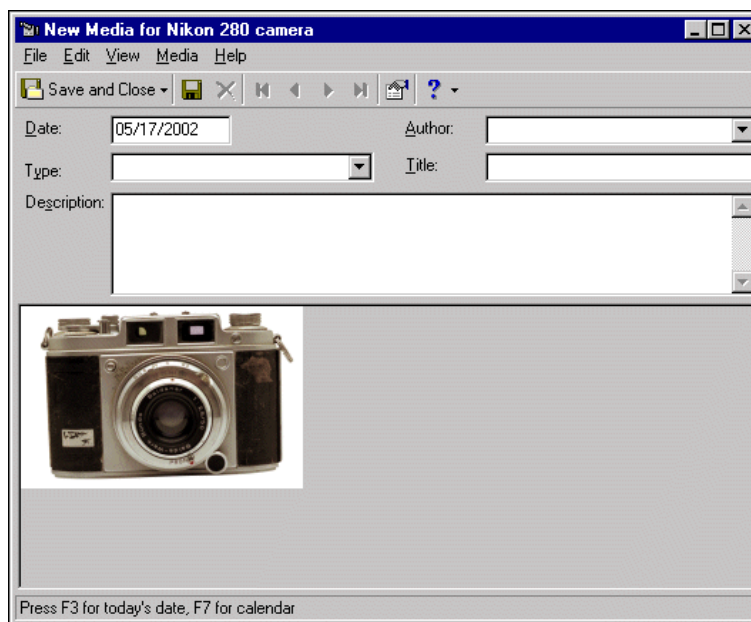> **Warning:** If the program cannot find an application, source file, or item, make sure the application is properly installed and that it was not deleted, moved or renamed.

4. Click **OK**. The New Media screen for the selected record appears with the selected media object.

5. In the **Date**, **Type**, **Title**, and **Description** fields, enter information about the media object.

> **Note:** You define media types in *Configuration*. You can also add new types "on the fly".

6. In the **Author** field, select your user name.
7. Click **Save and Close** to save the media object and return to the Media tab.

Adding Annotations to Records

If you want to be reminded of an important situation or condition regarding a particular record, you can create an annotation for the record.

▶ **Annotating a record**

> **Note:** Each record can have only one annotation.

1. From an open record, select **Edit, Annotate** or click the **Annotate** button on the toolbar. The Annotate screen appears.
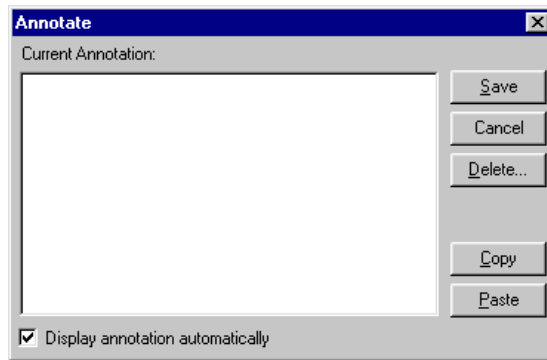
2. In the **Current Annotation** box, enter the information you want attached to the record.

3. For the annotation to pop up when you access the record, mark **Display annotation automatically**.

4. Once you complete the annotation, click **Save** to return to the record.

Using Default Sets

> **Note:** When you mark the **Automatically load field defaults** checkbox on the Field default sets screen, the default set is loaded to only the open record. The default set does not load automatically to records added after the current record.

Creating default sets is an optional task you can use to speed data entry. A default set can contain entries for almost every field in a record. If you repeatedly enter the same values in numerous record fields, you can create a default set with these values and use it to save time during data entry. You can load an entire default set at one time to an open record when you mark the **Automatically load field defaults** checkbox on the Field default sets screen. If you prefer to load defaults into only selected fields, you can use the **F2** key to load defaults into only selected fields. In addition, if you press **SHIFT** + **F2**, you can load default sets into multiple fields for an open record.

You can always manually change any field on a record after entering a default set. You can also load default sets into existing records. If a field in the record already contains a value, the default does not replace it, but default values from the set are entered in fields that do not contain data. However, after you load the default set, if you press **F2** on your keyboard while the cursor is in a field for which you defined a default, the default entry does overwrite the existing entry.

You can create a default set from the **Tools** menu or from the new record screen, following essentially the same steps. Step-by-step procedures for creating default sets from the **Tools** menu and loading a default set from an open record are included in this section.

▶ **Creating a record default set from the Tools menu**

> **Tip:** You can press **F2** to load default values into individual fields in an open record. Press **SHIFT** + **F2** to load default set values into multiple fields in an open record.

1. From the menu bar of the program shell, select **Tools**, **Organize/Create Defaults**. The Defaults screen appears.
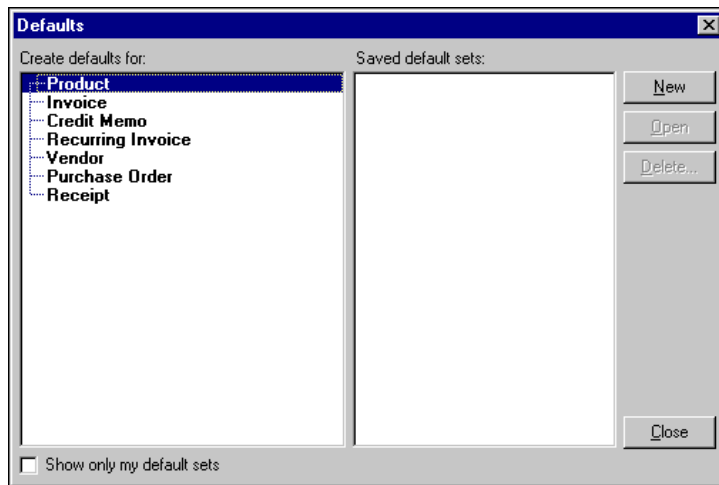
2. In the **Create default for** box, select the record type and click **New**. The New Default Set screen appears.
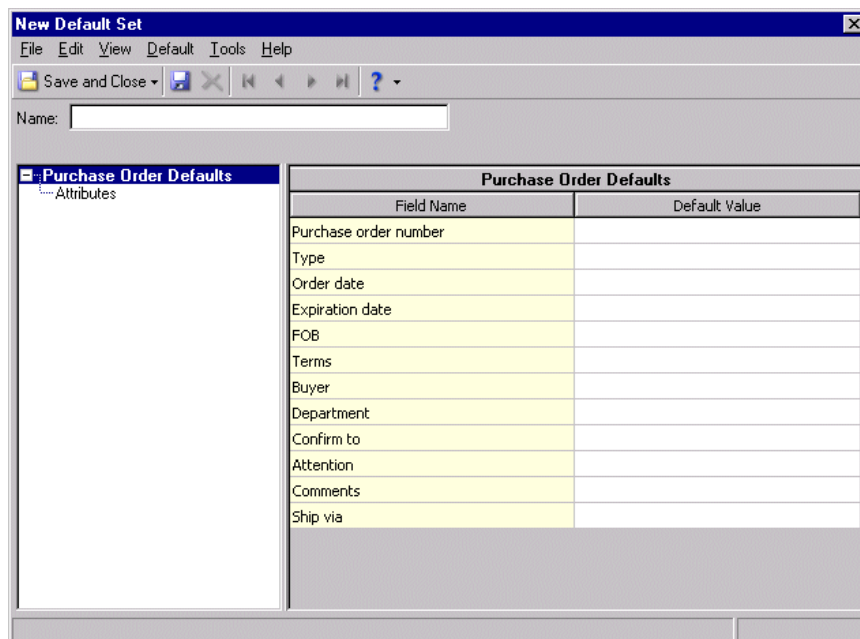
3. In the **Name** field, enter a descriptive name to help identify this record default set.

4. In the **<Record> Defaults** grid, enter a value in the corresponding field for each field default you want to include in this default set. Available fields vary according to record type.

5. Select **Save and New** to save the record default set and open a new one, or select **Save and Close** to save and exit the New Default Set screen.

▸ **Loading default sets**

When adding information to records, you can save time by loading default sets rather than entering the values manually each time. Once default values are entered into fields, they can be deleted or overwritten at any time.

1. From an open record, select **<Record>**, **Load Defaults from**. The Field default sets screen appears.

2. To view only the default sets that you created, mark the **Only show my default sets** checkbox.

Note: When you mark the **Automatically load field defaults** checkbox on the Field default sets screen, the default set is loaded to only the open record. The default set does not load automatically to records added after the current record.

3. In the **Saved default sets** box, select the default set to load.

4. To automatically load field defaults to the open record, mark the **Automatically load field defaults** checkbox.

5. Click **OK**. If you marked **Automatically load field defaults**, the default set loads onto the record.

   If you did not mark **Automatically load field defaults**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set onto the record.

Using Favorites

Tip: You can designate records and processes you use most frequently as favorites and create shortcuts to their locations. Favorites can be placed on a Home page, the **Favorites** menu, or the navigation bar.

Using the functions on the **Favorites** menu, you can designate the processes and saved records you use most frequently as favorites and create shortcuts to their locations. This is especially useful if you use functions in different programs to complete a single task. For example, during a routine *Accounts Payable* reconciliation process, you may print reports from both *Accounts Payable* and *General Ledger*, such as a General Ledger Report, an Open Invoice Report, and an Aged Accounts Payable Report. Rather than exiting *Accounts Payable* to open *General Ledger* and create the General Ledger Report, you can create a favorites folder with direct links to those reports. You can place this folder of shortcuts on the *General Ledger* or *Accounts Payable* Home page, the **Favorites** menu, or in a group on the navigation bar.

Using the Options Home tab, you can add links to a Home page for creating or opening items. These links are the same as those found on the pages of each record type. For example, the **Add a New Account** and **Open an Account** links are both found on the Accounts page. When you can add these same links to the *General Ledger* Home page, you can create a new account or open an existing account directly from the Home page without having to open *Records*. For more information about adding links to the Home page, see "Home" on page 67.

You have additional options for organizing favorites on the navigation bar. You can create a "group" to organize favorites and folders of favorites with similar characteristics. When you click on a group bar, all favorites and folders of favorites contained in that group appear. You can create up to four favorites groups on the navigation bar. For more information, see "Adding a favorites group to the navigation bar" on page 50.

▸ **Designating a record as a favorite**

Warning: You can designate records and processes as favorites, even if you do not have security rights to those features. However, you cannot access and use any favorites for which you do not have the appropriate security rights.

1. From the menu bar of an open record, select **Favorites**, **Add to favorites**. The New Favorite screen appears.

   The program assigns a name to the favorite based on the record type and ID. You can rename the favorite and edit the information in the **Description** field.
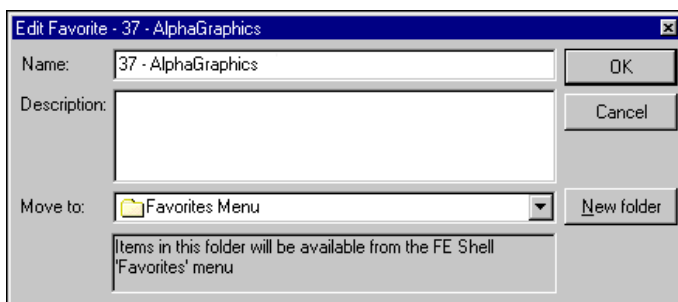
2. In the **Create in** field, select a folder to store the favorite. The frame below the **Create in** field displays a description of the selected folder's location.

Click **New folder** to create a new folder for the new favorite.

Note: To designate a page as a favorite, follow this same procedure, except select **Favorites, Add page to Favorites**.

3. Click **OK** to save the favorite.

▶ **Designating a Web page as a favorite**

You can create favorites that serve as direct links to specified Web pages. You can place these links at any favorites location. This procedure describes how to add a link to the Blackbaud Knowledgebase to your homepage in *Accounts Payable*. The steps are essentially the same for each program.

Note: The **Show favorites** option must be marked on the Home Page Options tab to make selected favorites available from the Home page. For more information about favorites options, see the Options chapter of this guide.

1. Right-click anywhere on the desktop of your computer. From the menu that appears, select **New**, **Shortcut**. The Create Shortcut screen appears.

2. In the **Command line** field, enter the address for the Web page for which you want to create the favorite or click **Browse** to search for the address.
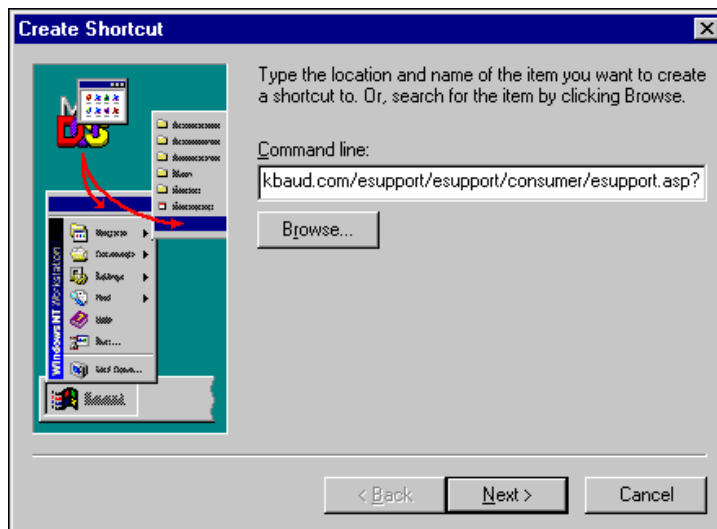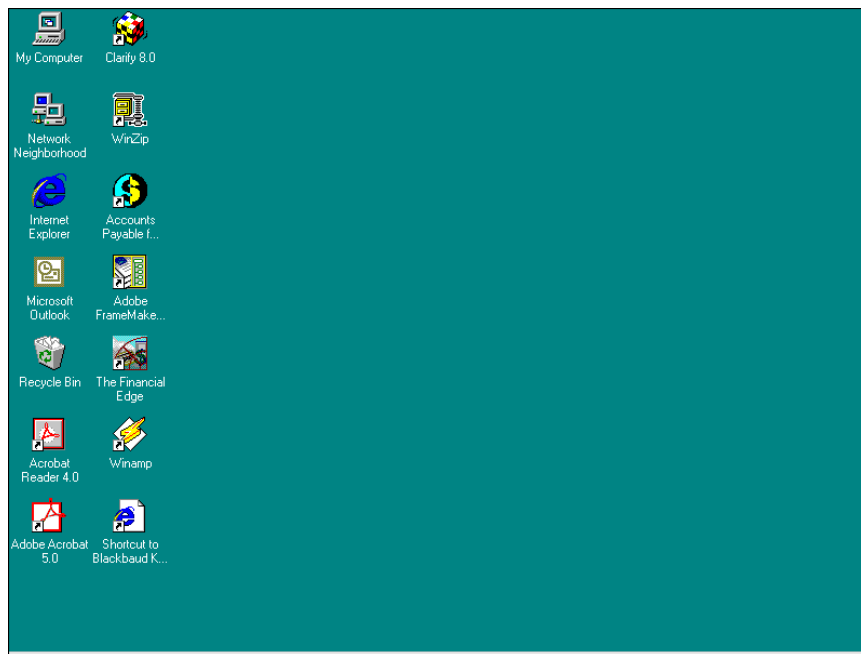

3. Click **Next**. The Select a Title for the Program screen appears.

4. In the **Select a name for the shortcut** field, enter a name for the shortcut. For example, "Shortcut to Blackbaud Knowledgebase".
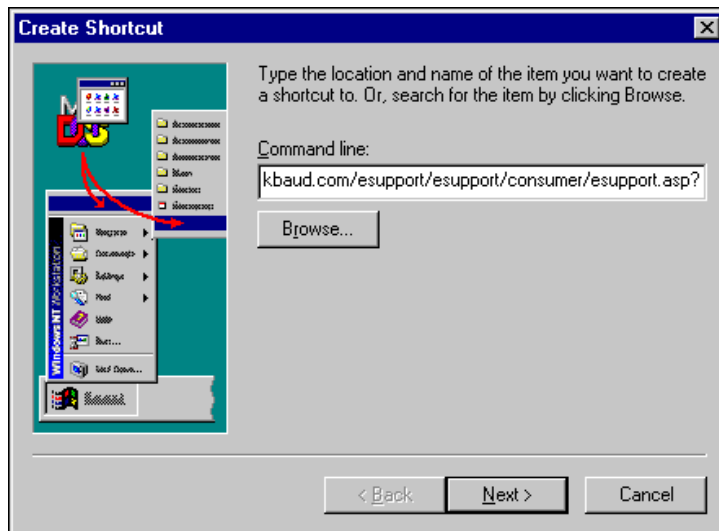

5. Click **Finish**. The Select a Title for the Program screen closes and a shortcut icon for the Web page appears on your desktop.

6. Open the program to the Home page. For this example, we open **Accounts Payable**. Click the Restore button in the upper right corner of the screen to reduce the size of the screen. You can now access both the Home page and the desktop.
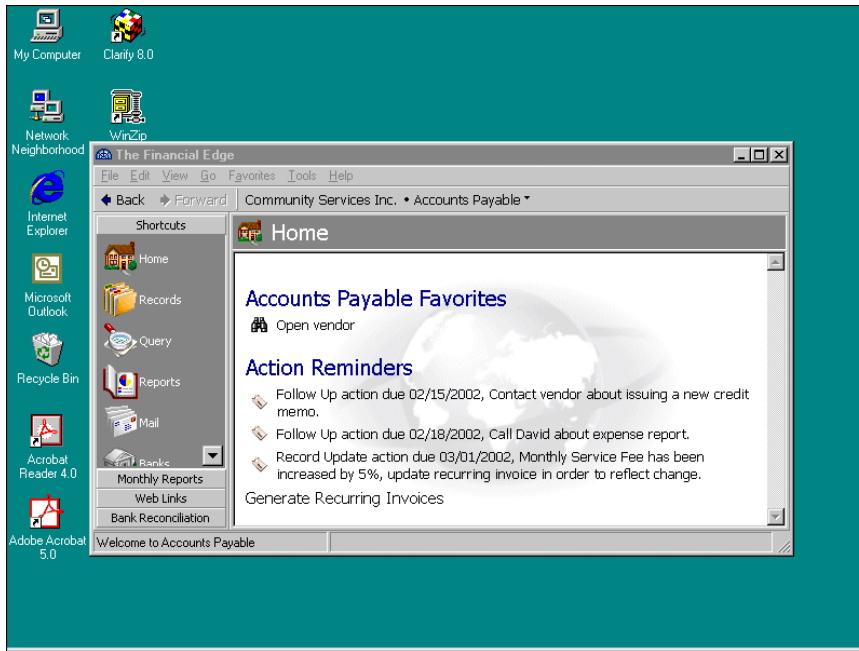

7. Click and drag the shortcut icon to the Home page. The Web page appears in the shell. Click the Maximize button to expand the screen to its full size.

8. To designate this page as a favorite, from the **Accounts Payable** menu bar, select **Favorites**, **Add page to favorites**. The New Favorite screen appears. The program assigns a name to the favorite based on the record type and ID. You can use the default name and description or enter your own.
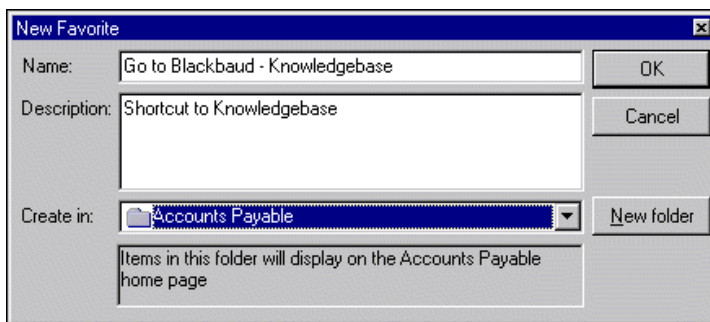
9. In the **Create in** field, select the program where the favorite should appear. In this example, we select "Accounts Payable".

10. Click **OK** to save the favorite.

11. On the navigation bar, click **Home**. The Accounts Payable Home page appears with the new link to the Web page.
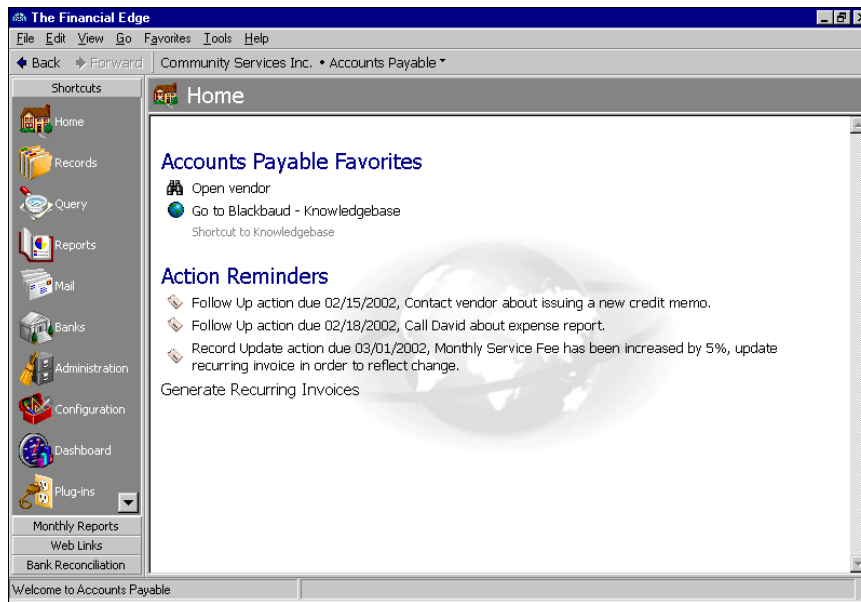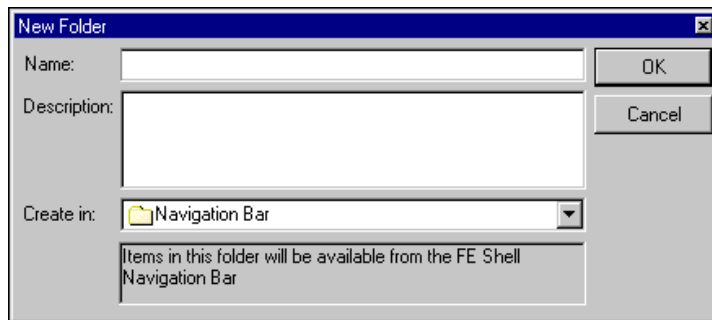

▶ **Adding a favorites group to the navigation bar**

For this example, we create a group for bank reconciliation processes and reports. You can use this procedure as a model for adding other types of favorites groups to the navigation bar.

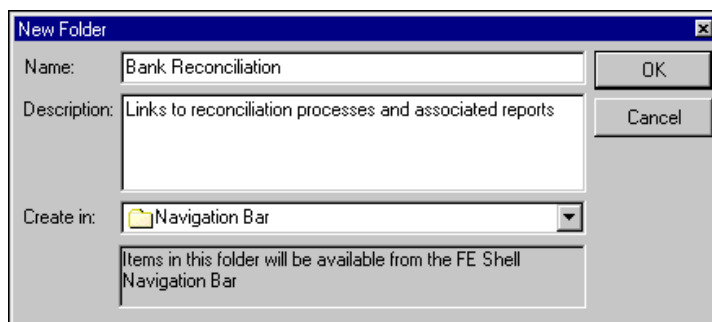1. From the menu bar, select **Favorites**, **Organize Favorites**. The Organize Favorites screen appears.
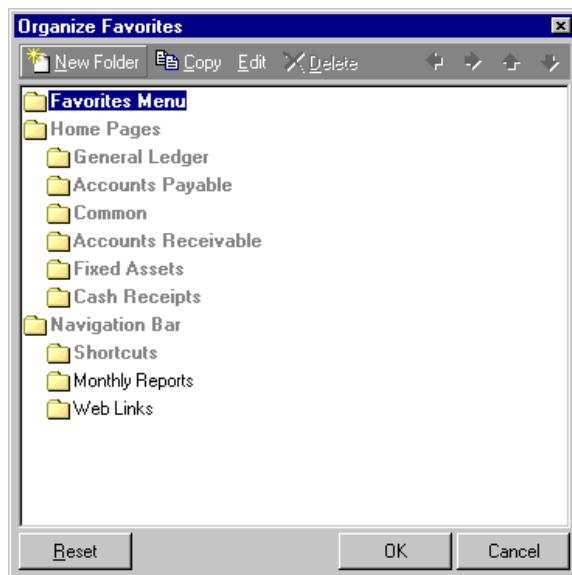
2. Select the Navigation Bar folder and click **New Folder**. The New Folder screen appears.
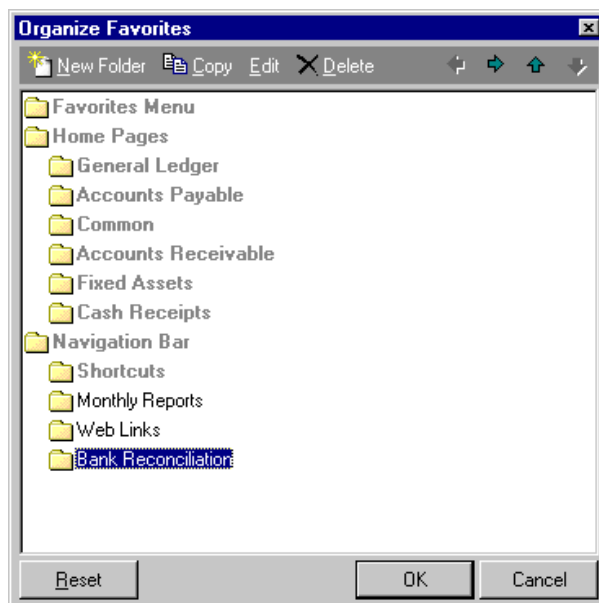
3. In the **Name** field, enter "Bank Reconciliation".
4. In the **Description** field, enter "Links to reconciliation processes and associated reports".
5. In the **Create in** field, select "Navigation Bar".

6. Click **OK**. You return to the Organize Favorites screen and the Bank Reconciliation folder appears below the Navigation Bar folder.

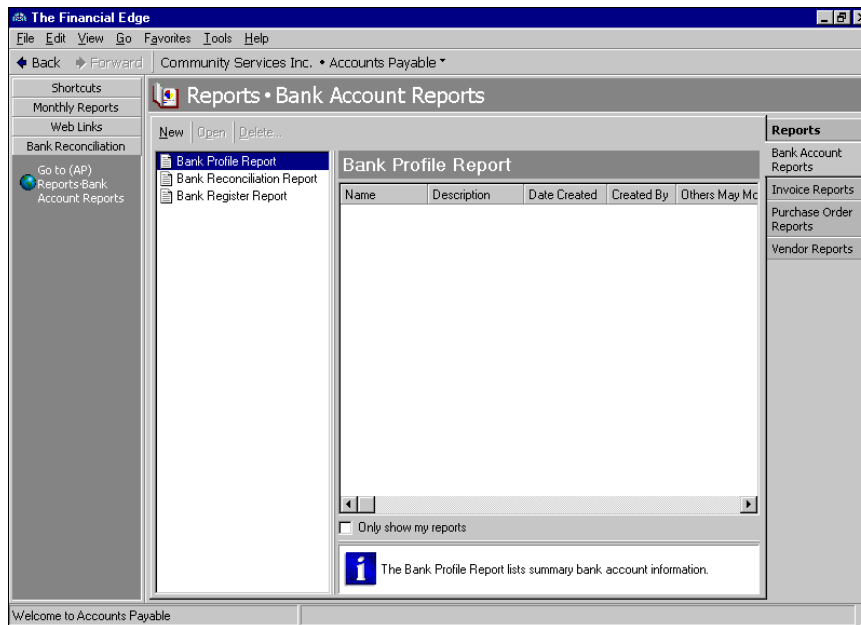7. Click **OK** to close the Organize Favorites screen. The Bank Reconciliation group now appears on the navigation bar.
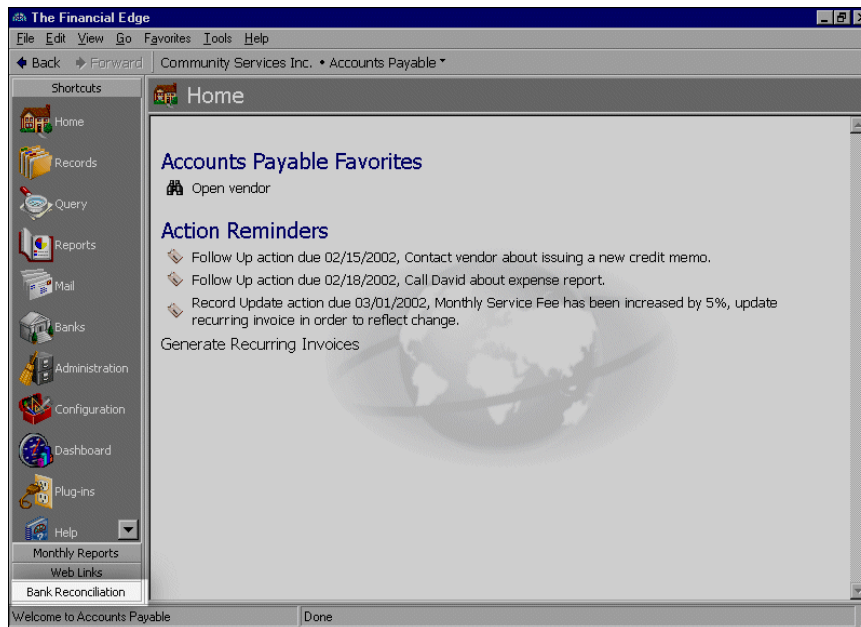
8. Select *Reports*. The Reports page appears.

9. Select **Bank Account Reports**. The Bank Account Reports page appears.
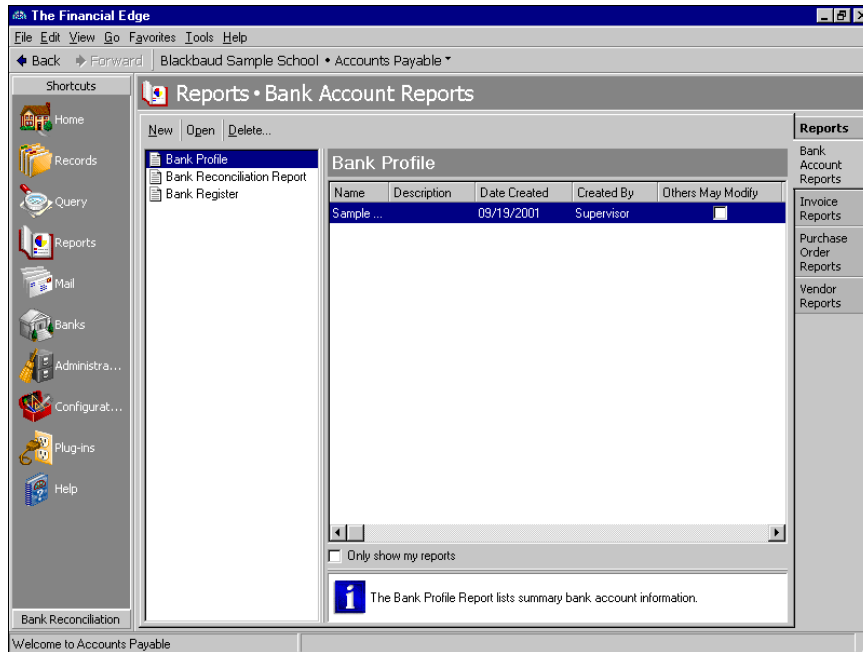
Note: To designate a record as a favorite, follow this same procedure, except select **Favorites, Add to Favorites** from the record screen.

10. From the menu bar, select **Favorites, Add Page to Favorites**. The New Favorite screen appears. The program assigns a name to the favorite based on the record type and ID. You can use this name and description or rename the favorite and edit the **Description** field.

11. In the **Create in** field, select "Bank Reconciliation".
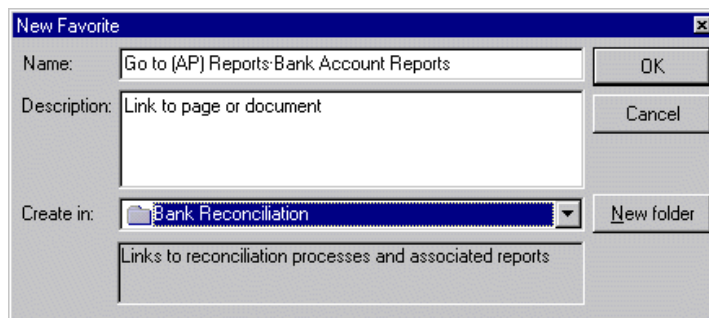
12. Click **OK** to save and close the New Favorite screen. You return to the Bank Account Reports page.

13. From the navigation bar, click the Bank Reconciliation group bar. The Go to (AP) Reports-Bank Account Reports folder appears in the group.
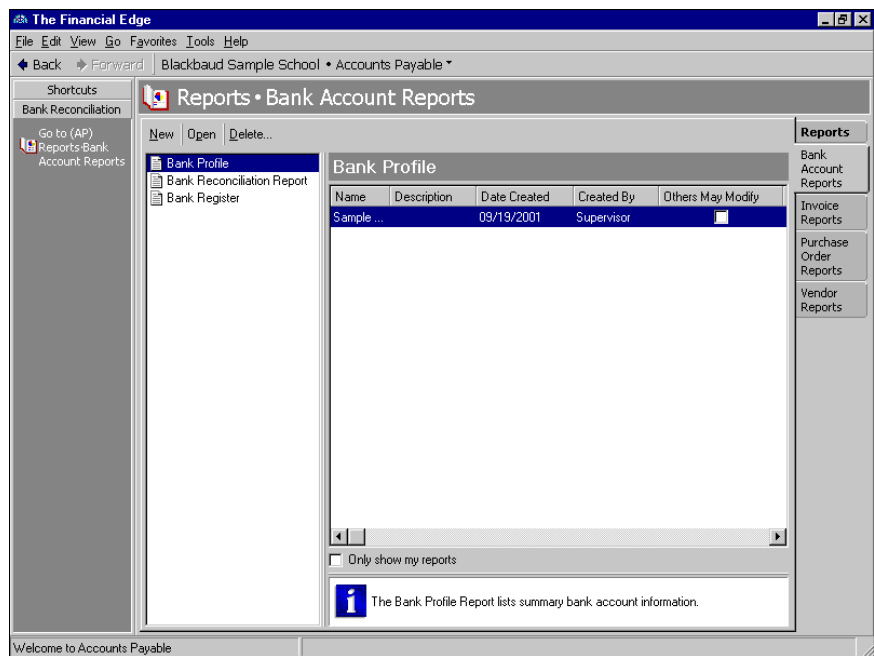
14. You can continue adding additional favorites to this group by repeating steps 8 through 12.

▶ **Organizing favorites**
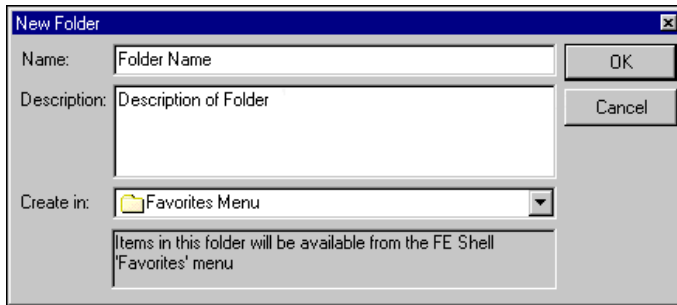
1. From the menu bar, select **Favorites**, **Organize Favorites**. The Organize Favorites screen appears.
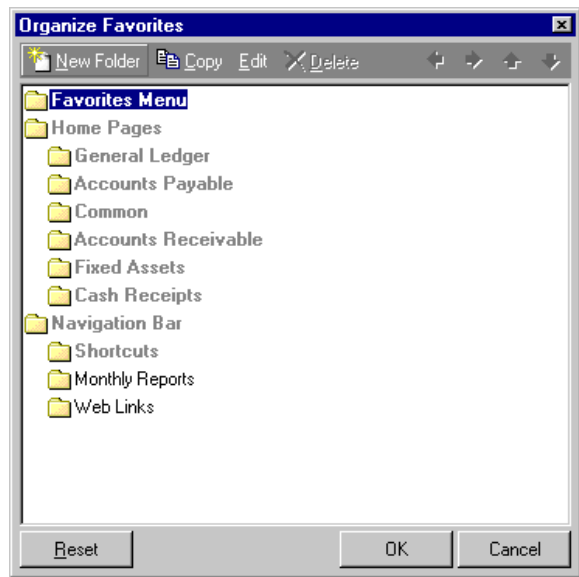
Favorites Menu, **Home Pages**, and **Navigation Bar** are default favorites folders. Favorites found in each folder appear directly below that folder.

The Home Pages and the Navigation Bar folders have additional folders listed below them. For example, the Home Pages folder contains additional default folders for each program. Favorites found in the General Ledger folder are located on the General Ledger Home page. To view the contents of a folder, click the plus sign to the left of the folder.
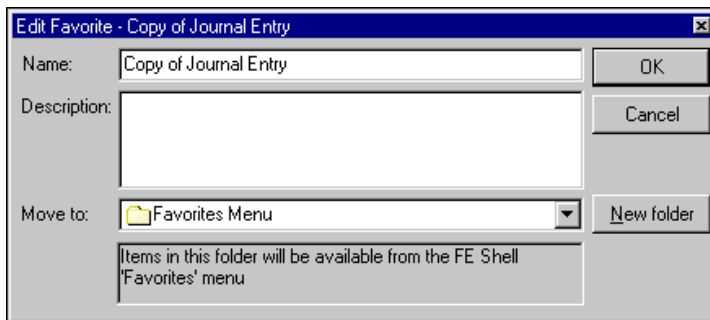
2. To create a new folder, click **New Folder**. The New Folder screen appears.

3. In the **Name** field, enter a name for the folder.

4. In the **Description** field, enter a short description of the contents of the folder.

5. In the **Create in** field, select the folder location. For example, Favorites Menu.

6. Click **OK**. You return to the Organize Favorites screen and the new folder appears below the Favorites Menu folder.

▶ **Copying favorites or folders of favorites**

1. To copy a favorite or a folder of favorites, select the favorite or folder you want to copy and click **Copy**. The Edit Favorite/Folder screen appears for the selected favorite.

2. Name the copy, enter a description, and select the location for the new favorite.

3. Click **OK**. You return to the Organize Favorites Screen, and the new folder appears below the specified location.

▶ **Editing favorites**

Note: From the Organize Favorites screen, you can move favorites or folders of favorites from one location to another. Simply select the favorite or folder you want to move and click the up and down arrows.

1. To edit a favorite, select the favorite you want to edit and click **Edit**. The Edit Favorite/Folder screen appears for the selected favorite.

2. Make any changes to the name, description, or location for the favorite.

3. Click **OK**. You return to the Organize Favorites Screen, and the edited favorite appears below the specified location.

▶ **Deleting favorites**

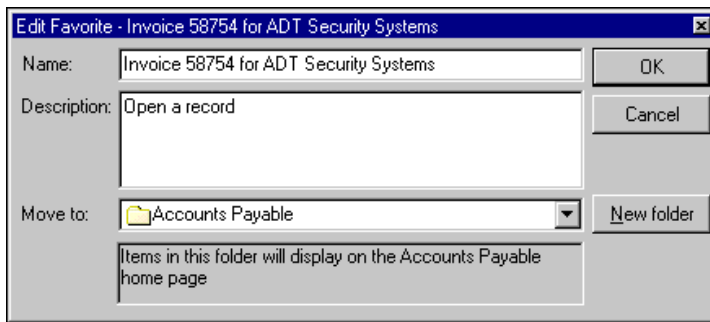1. To delete a favorite, select the favorite you want to delete and click **Delete**. This deletes only the favorite bookmark, not the actual record. For example, if you designate an account record as a favorite, deleting that favorite does not delete the record.

2. To delete all user-defined favorites and folders, click **Reset**. A message appears asking if you are sure you want to reset the folder structure.

3. To reset the folder structure, click **Yes**. Click **No** to cancel and return to the Organize Favorites screen.

4. Click **OK** to save your changes.

Changing Passwords

If you have security rights, you can change your password from any page in the program. We recommend you change your password periodically to maintain the integrity of your security system. If you do not have security rights to change your password, a user with supervisor rights can change it for you. For more information about changing passwords for users, see the Security chapter of the *Administration Guide*.

▶ **Changing your password**

1. From menu bar on any page, select **Edit**, **Change Password**. The Change Password screen appears.
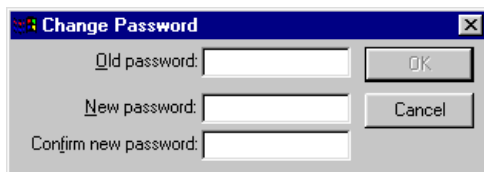
Note: For privacy, only asterisks appear when you make entries on the Change Password screen.

2. In the **Old password** field, enter your old password.

3. In the **New password** field, enter your new password.

4. In the **Confirm new password** field, reenter your new password. Your entry here must exactly match the entry in the **New password** field.

5. Click **OK** to save the new password.

Printing Information

In each program, there are multiple ways to print the information contained in your database. For example, you can easily print grids and reports while working in any program.

Anytime you see a grid, you can print the data in the grid by right-clicking and selecting **Print** from the menu. Using the Print Grid Options screen, you can select the format of the printout.

You can print reports without opening *Reports*. For example, if you are working in *Accounts Receivable* with a client record, to print a Client Profile Report, you can click **Print** on the action bar. Using the Select a Parameter File screen, you can select an existing report parameter file or create a new one.

Before you can print from the program, you need to set up a printer, which you accomplish on the Print Setup screen. You may already be familiar with this screen because it is common to most *Windows* programs. Use the Print Setup screen to designate a path to your printer and a paper size, source, and orientation.

▶ **Setting up a printer**

1. From the **File** menu on the shell, select **File**, **Print Setup**. The Print Setup screen appears.
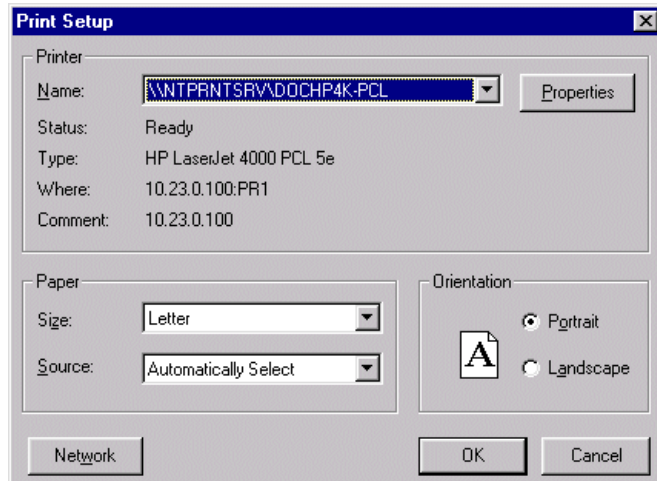
2. In the **Name** field, select the name of your printer. Click **Properties** to view page setup and advanced properties established for the printer.

3. In the **Paper** frame, select the size and source of the paper you use.

> **Warning:** Some reports automatically select a paper orientation and override the default setting.

4. In the **Orientation** frame, mark an option to determine if you want to print in portrait or landscape format.

5. Click **Network** if you want to connect with a network printer to which you have not already set a path.

6. Click **OK** to save your selections.

▶ **Editing print grid options**

While this procedure demonstrates editing the print grid options when printing the Actions tab of a student record in *Registrar's Office*, you can use it as a reference when printing other grids because the process is similar.

1. From an open student record, select the Actions tab.
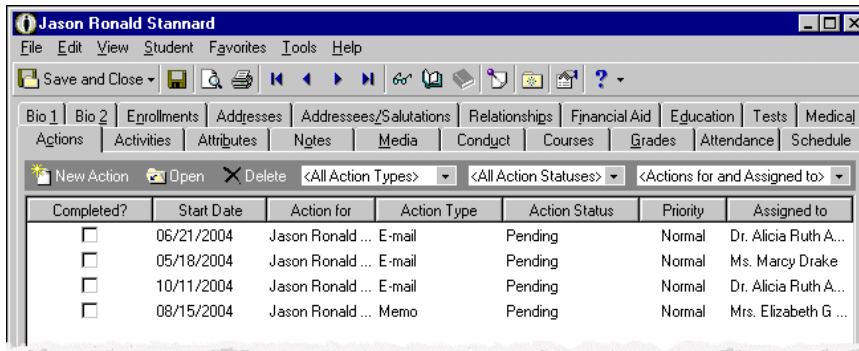

2. With your cursor in the grid, right-click and select **Print**. The Print Grid Options Screen appears.
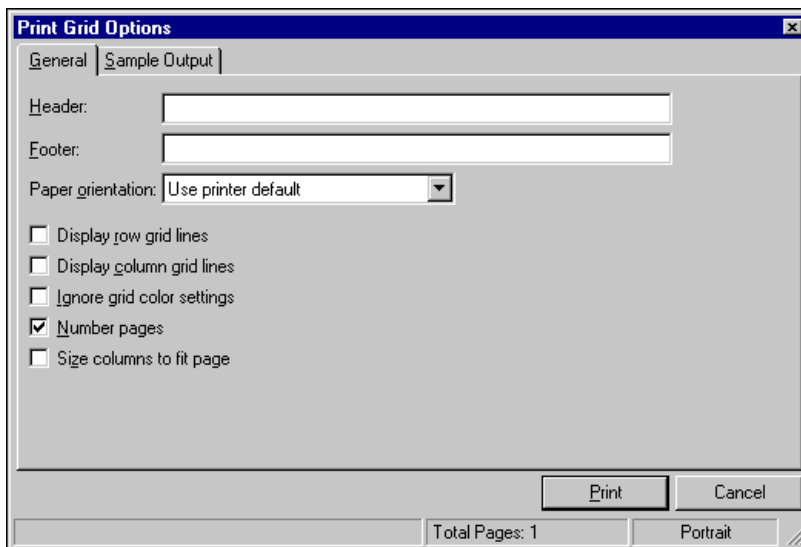
3. To print a header, in the **Header** field, enter the text to appear.

4. To print a footer, in the **Footer** field, enter the text to appear.

5. To select a print orientation, in the **Paper orientation** field, select "Use printer default", "Best fit", "Portrait", or "Landscape".

    • If you select "Use printer default", the grid prints in the orientation defined on the Print Setup screen.

    • If you select "Best fit", the program prints the grid in landscape or portrait depending on which orientation best fits the grid.

    • "If you select "Landscape", the program overrides the default orientation and prints in landscape.

    • If you select "Portrait", the program overrides the default orientation and prints in portrait.

6. To print the row and column grid lines, mark **Display row grid lines** and **Display column grid lines**.

7. To print in grayscale, mark **Ignore grid color settings**.

8. To number the pages on the printout, mark **Number pages**.

9. For the program to automatically size the columns to fit the page, mark **Size columns to fit page**.

10. To preview the printout, select the Sample Output tab.
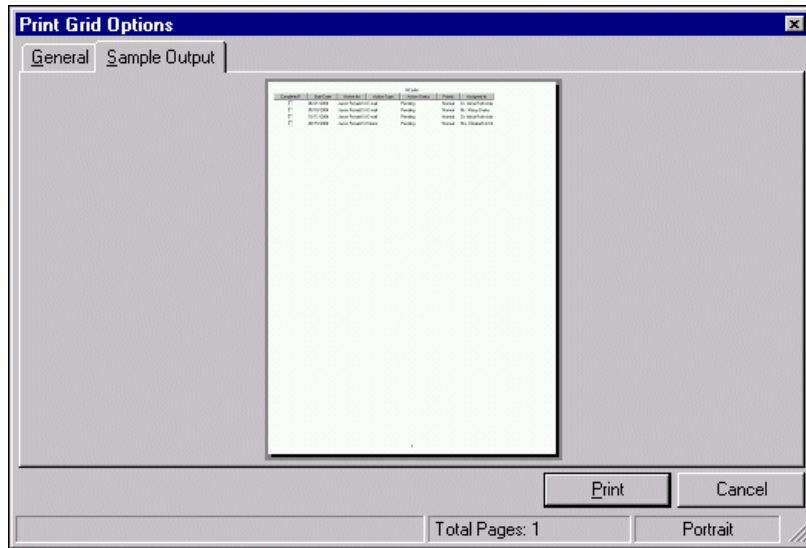
11. To print the report and return to the student record, click **Print**.

▶ **Selecting a parameter file to print a report**

Note: To open a parameter file, select the file in the grid and click **Open**.
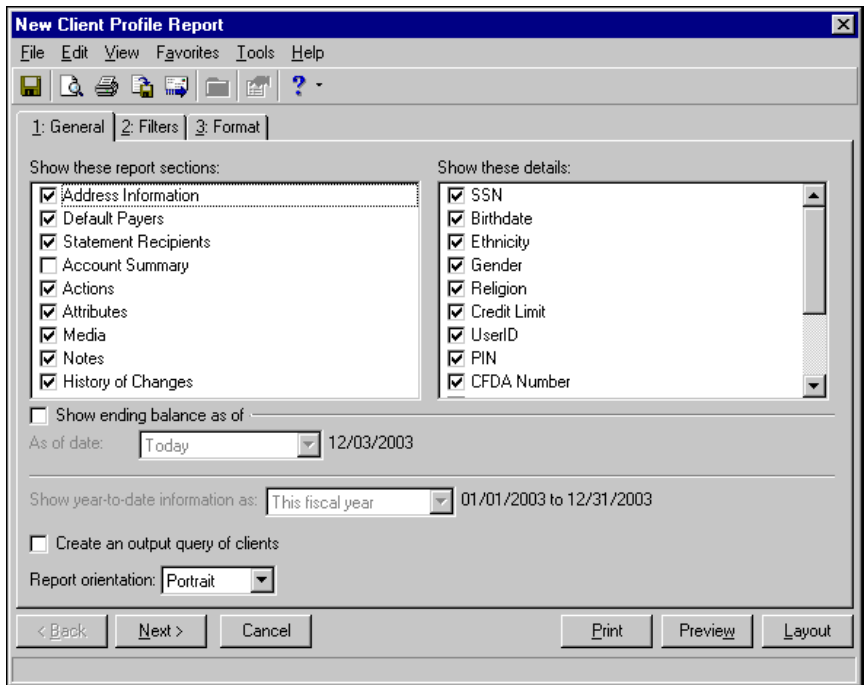
1. From an open record, click **Print**. The Select a Parameter File screen appears.
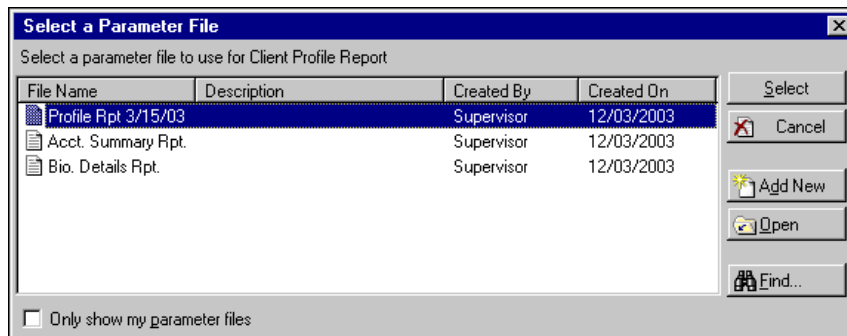
2. To print the report using an existing parameter file, select the file from the grid and click **Select**. A processing screen appears and the report prints.
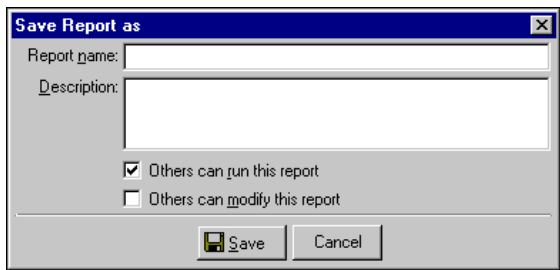
▶ **Adding new report parameter files**

1. To create a new parameter file, click **Add New**. The report parameter screen appears.

2. Create the report parameter file. For more information about creating report, see the *Reports Guide* for the program in which you are working.

3. Click **Save**. The Save Report as screen appears.

4. Enter a name and description for the report parameter file.

5. To the file and return to the parameter file screen, click **Save**.

6. To return to the Select a Parameter file screen, select **File**, **Close**. The new parameter file appears in the grid.

7. To print the report with the new parameter file, select it in the grid, and click **Select**. A processing screen appears and the report prints.

Blackbaud Administration Console

Microsoft recently released the *Windows Vista* operating system. This operating system has a number of new features not present in earlier versions of *Windows*. One of these new features is the result of Microsoft's emphasis on security: User Account Control (UAC). Due to *Windows Vista's* enhanced security features, a user that is part of the Administrators group no longer holds all of the administrative privileges necessary to complete the following tasks:

• Install Queue Service

• Register DB

• Synchronize Integration Data

• Unlock additional modules

• Register Plugins

• Install Aatrix

When you select one of these tasks from the program, the UAC Elevation Prompt displays. Depending upon the task you are performing, the Blackbaud Administration Console may also open to help you complete the task.

Options

Note: In Security, a supervisor can define user options for each user or can give each user rights to set his or her own user options in **Options**. For more information about security, see the Security chapter of the *Administration Guide*.

With Options, you can customize the look of screens and establish a wide variety of default values. Select the settings that best suit your personal needs, whether you want to open records directly from the Home page or change the color of text appearing in certain grids. The program stores your options in the database, so any workstation you enter with your password uses your settings. Other users are unaffected by your settings in Options.

Generally, options specify defaults that help increase the ease and speed of data entry. If you decide you do not want to use a pre-set default while creating a record, you can usually override the default on the actual record screen.

Accessing Options

Note: Visit our website at www.blackbaud.com for the latest documentation.

To access the Options screen, select **Tools**, **Options** from the menu bar. On the Options screen, select the tab for the type of options you want to set.

To apply the selected options without exiting the Options screen, click **Apply**. To apply the settings and exit the Options screen, click **OK**. To clear all tab settings so you can set new ones, click **Reset to System Defaults**.

Note: If you click **Reset to System Defaults**, the program clears all tab settings, including all favorites.

If you have supervisor rights, when creating a new user in Security, you can easily copy the user options defined for an existing user to the new user. For more information about security for users, see the Security chapter of the *Administration Guide*.

General

Note: Field names and screens may differ based on products you have installed.

On the General tab, you set personal preferences for all products.
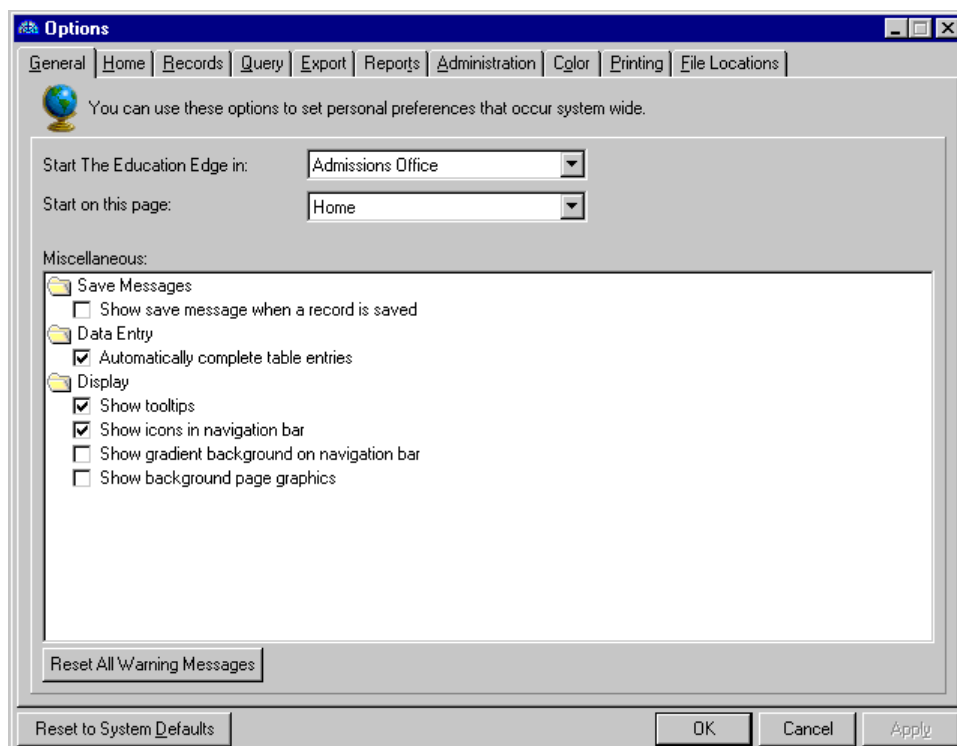
Start in. Select the program to open first when you log into the program.

Start on this page. Select the page in the program that appears when you log into the program. For example, you can specify the Reports page to appear.

Miscellaneous. In this box, mark the options for saving messages, data entry, and the display.

- To receive confirmation each time you save a record, mark **Show save message when a record is saved**.

- If you want the program to automatically fill in text as you type the first few characters in a field containing table entry values, mark **Automatically complete table entries**.

- To view the name of a toolbar button as you move your cursor over it, mark **Show tooltips**.

- To see the pictograms of each shortcut in the navigation bar, mark **Show icons in Navigation Bar**. To view only text in the navigation bar, unmark this option.

- To use your *Windows* color settings as the background on the navigation bar, mark **Show gradient background on Navigation Bar**.

- To view the graphics appearing as watermarks on many pages, mark **Show background page graphics**. To view only a white background, unmark this option.

Reset All Warning Messages. As you work in the program, you can turn off warning messages. To turn on all warning messages so they appear again, click **Reset All Warning Messages**.

Home

Note: Some options are available only if you have optional modules installed.

On the Home tab, you select commonly used functions to appear on the Home page as favorites. For example, if you frequently create new invoices, mark **Create a new invoice** in the **Favorites Options** box. You can also designate current actions to appear on the Home page as reminders.
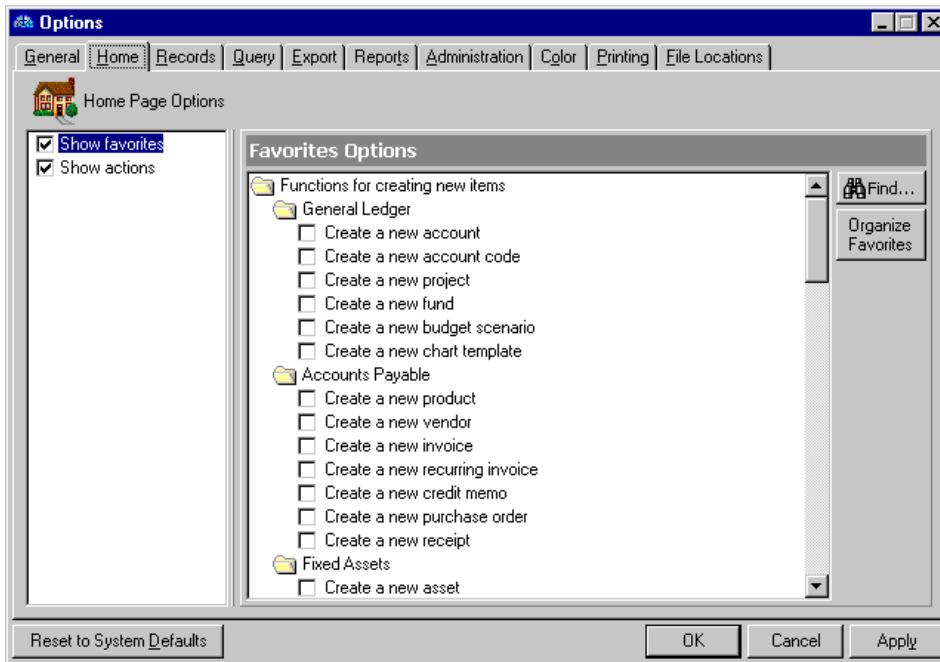
> **Note:** You must mark **Show favorites** to activate the function checkboxes and the **Find** button.

Show favorites. To display favorites on the Home page, mark **Show favorites**. Then mark checkboxes for the functions you want to appear on the Home page. To locate functions in the list to include as a favorite, click **Find**. To edit and organize the list of favorites, click **Organize Favorites**.

Show actions. To show actions with a current due date on the Home page, mark **Show actions**. The action reminder appears according to the auto-remind time set on the Actions tab on the record.

General Ledger Records Options

The options you define on the Records tab of the Options screen in *General Ledger* affect records, the visual chart organizer, and other areas of the program.

General

For General options on the Records tab, select a default character place holder for account numbers that have not yet been designated.
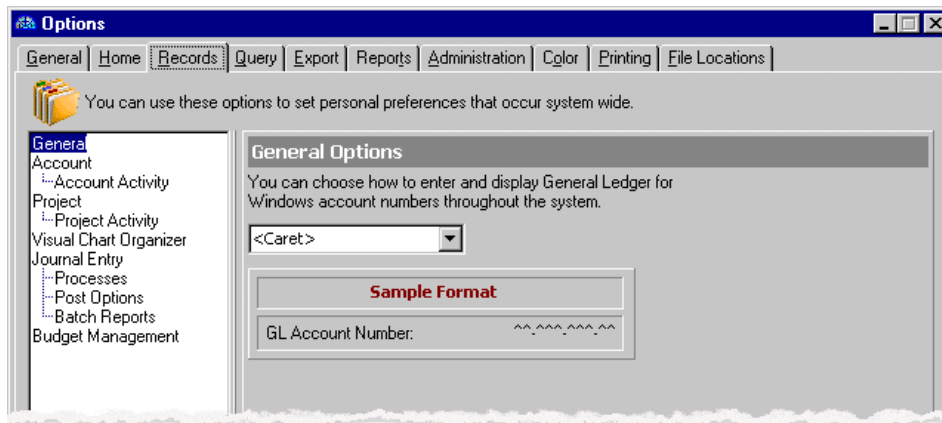
Account

For Account options on the Records tab, select the tab to appear first when you open an account record. For example, if you generally open account records to view activity, select Activity as the default tab.
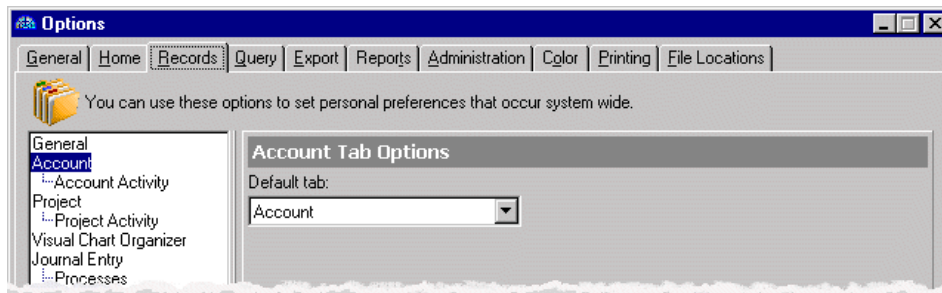
Account Activity

Note: To readjust column width in a grid, move the cursor over the right end of the column header and drag the divider to the left or right.

For Account Activity options on the Records tab, select default values to appear on the Activity tab of account records. For example, you can set defaults for display format, activity type, and fiscal years.
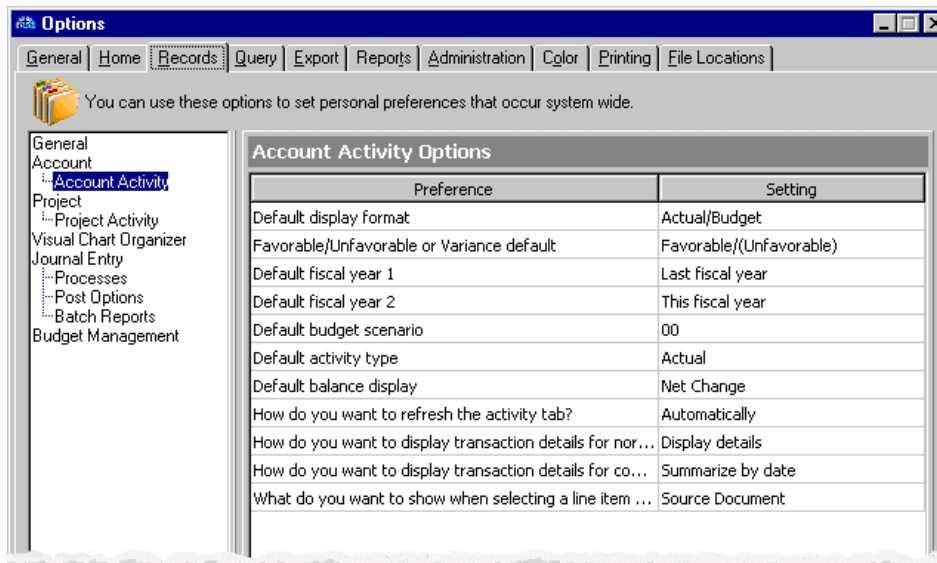
Default display format. To define the format in which activity automatically appears on account records, select Actual/Budget, Comparative, or Debit/Credit. You can change this setting on the Activity tab if you need to view a different display format.

> **Note: Favorable/ Unfavorable** displays the difference between actual and budget amounts. For example, if the actual amount of a revenue or gift account is over budget, this is favorable. An expense or transfer account over budget is unfavorable. **Variance** displays the budget amount minus actual amount.

Favorable/Unfavorable or Variance default. To define a default for the way budget versus actual amounts appear, select Favorable/(Unfavorable) or Variance.

Default fiscal year 1. To define the default for the first fiscal year, you can select Last fiscal year, This fiscal year, or Next fiscal year. It appears on the Activity tab in a date format.

Default fiscal year 2. To define the default for the second fiscal year, you can select Last fiscal year, This fiscal year, or Next fiscal year. It appears on the Activity tab in a date format. The Default fiscal year 2 is used if you are viewing a Comparative format.

Default budget scenario. If you have the optional module *Budget Management*, select a default budget scenario ID.

Default activity type. Select Actual, Encumbrance, or Both as the default amount to appear on account activity. If you select Both, the total of the Actual and Encumbrance amounts appears.

Default balance display. To define the default balance display, select Net Change or Ending Balance.

How do you want to refresh the activity tab? If you select Automatically, the Activity tab immediately refreshes grids with any changes to Format, Dates, Budget Scenario, or Net Change/End Balance entries. If you select On demand, you must click **Calculate** to refresh the grids with new entries.

How do you want to display transaction details for normal accounts? You can select to show details or to summarize by date.

How do you want to display transaction details for control accounts? You can select to show details or to summarize by date.

What do you want to show when selecting a line item on the transaction details form? Select to show debit/credit information or to open the source document.

Project

Note: **Project** appears as a selection in the tree view only if you have the optional module *Projects and Grants*.

For Project options on the Records tab, select the tab to appear first when you open a project record.
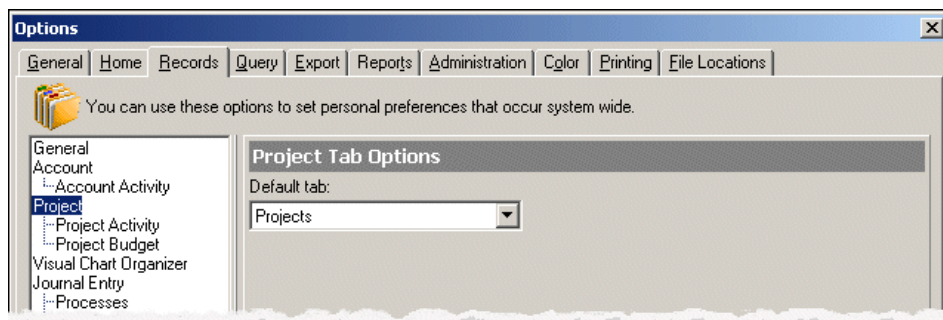
Project Activity

Note: **Project Activity** appears as a selection in the tree view only if you have the optional module *Projects and Grants*.

For Project Activity options on the Records tab, select default values to appear on the Activity tab of project records. For example, you can set defaults for display format, activity type, and fiscal years.
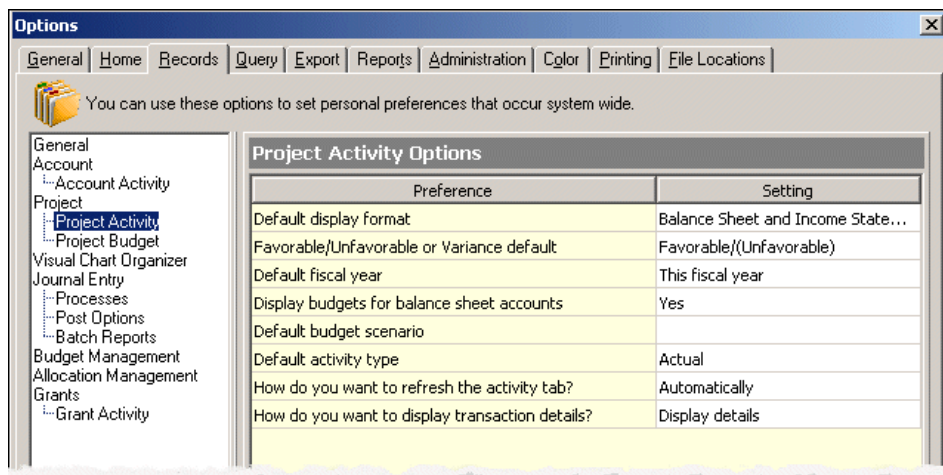
Default display format. To define the default for the display format, you can select Balance Sheet and Income Statement or Income Statement only.

Note: **Favorable/ Unfavorable** displays the difference between actual and budget amounts. For example, if the actual amount of a revenue or gift account is over budget, this is favorable. An expense or transfer account over budget is unfavorable. **Variance** displays the budget amount minus actual amount.

Favorable/Unfavorable or Variance default. To define the default for the way project activity appears, you can select Favorable/(Unfavorable) or Variance.

Default fiscal year. To define the default for the fiscal year, you can select Last fiscal year, This fiscal year, or Next fiscal year. This fiscal year refers to the current fiscal year.

Display budgets for balance sheet accounts. To define whether to display the budgets for balance sheet accounts, you can select Yes or No. If you select Yes, an additional column for **Budget** appears in the **Balance Sheet** grid on the Activity tab. If you select No, the **Balance Sheet** grid contains columns only for **Category** and **Actual**.

Default budget scenario. If you have the optional module *Budget Management*, you can select a default budget scenario ID.

Default activity type. To define default activity type, you can select Actual, Encumbrance, or Both.

How to you want to refresh the activity tab? To define the method for refreshing the activity tab, you can select Automatically or On demand. If you select Automatically, the Activity tab immediately refreshes grids with any changes to Format, Dates, Budget Scenario, or Net Change/End Balance entries. If you select On demand, you must click **Calculate** for the system to refresh the grids with new entries.

How do you want to display transaction details? To define how the system displays transactions, you can select Summarize by date or Display details.

Project Budget

> **Note: Project Budget** appears as a selection in the tree view only if you have the optional module *Projects and Grants*.

For Project Budget options on the Records tab, select default values to appear on the Budget tab of project records. For example, you can set defaults for display format, activity type, and fiscal years.
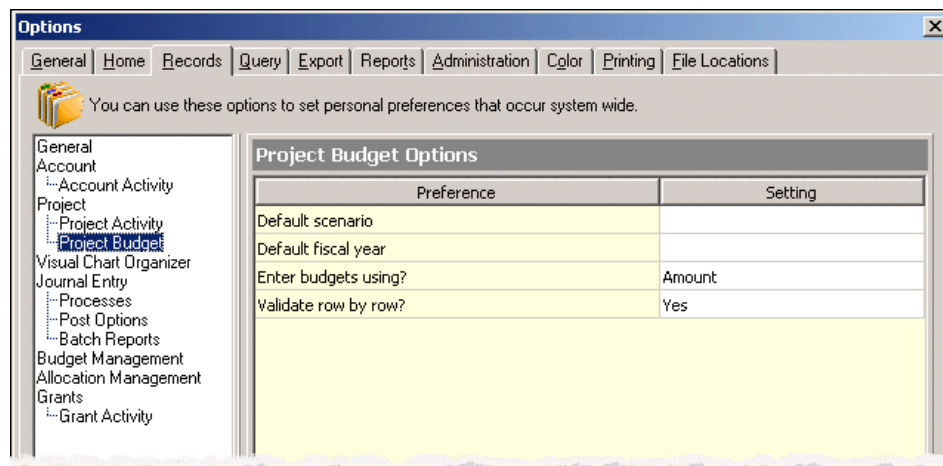
Default scenario. To set a scenario for automatic use each time you create a new budget, select a scenario ID. When you create a new budget, you can change the scenario ID manually.

Default fiscal year. To set a fiscal year for automatic use each time you create a new budget, select Last fiscal year, This fiscal year, or Next fiscal year. This fiscal year refers to the current fiscal year.

Enter budgets using? To define the default format when entering budgets, select Amount or Percent.

Validate row by row? Specify for the program to validate data entry row by row when the information is entered or only when saving.

Visual Chart Organizer

For Visual Chart Organizer options on the Records tab, select default values to indicate the appearance of the chart template when it is opened, which chart template is used in reports, whether to synchronize formatting of the lines in a chart template, and whether warnings should appear when you delete header/total lines.
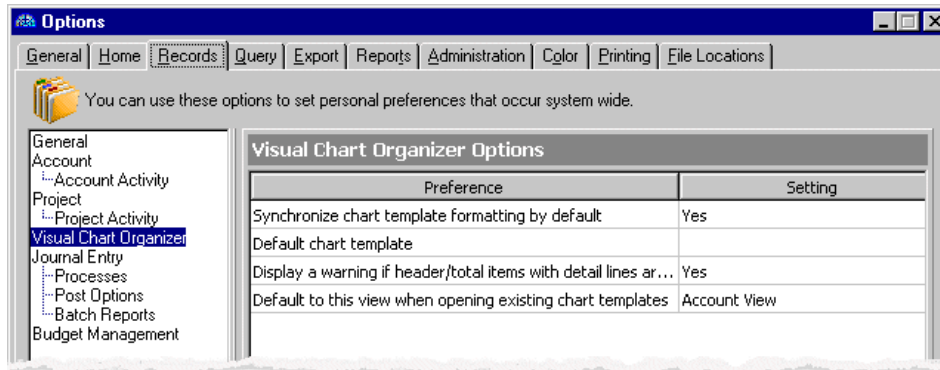
Synchronize chart template formatting by default. When you select Yes, the program ensures that formatting selections, such as the font, are the same for each line in a level. Formatting comes from the first line of each type and level in the header.

Note: You can override defaults on each chart template.

Default chart template. You can select a chart template as the default template used when reporting. You can override this default on the General tab of each report.

Display a warning if header/total items with detail lines are deleted. This is a safety feature to ensure detail lines are not deleted without confirmation when you delete a header/total. To receive a warning each time you delete a header/total, select Yes.

Default to this view when opening existing chart templates. Select Account View or Design View as the default format when you open a chart template. In the Account View, the information is organized by account category. In the Design View, the chart template is organized by balance sheet accounts and income statement accounts and shows leveling within categories. This option can be manually changed after you open the template.

Journal Entry

For Journal Entry options, you can specify preferences, such as whether to maximize the batch screen automatically when opened, which tab should appear first when you open a batch, whether to display transaction and batch details, and how to enter default information in new batches.
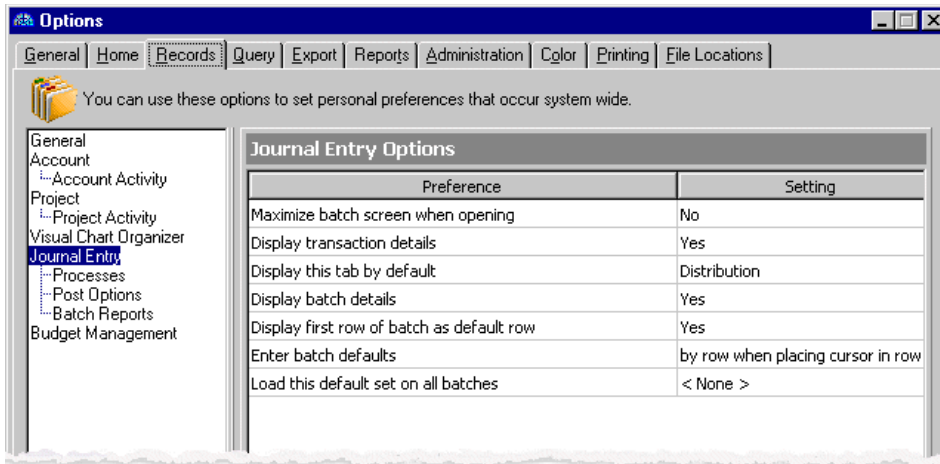
Maximize batch screen when opening. To have a batch open automatically to the full size of your screen, select Yes. To have a batch open in a smaller window where you can still view open screens behind it, select No.

Display transaction details. To show transaction details on a batch, select Yes. If you select No, the Distribution, Attributes, and Notes tabs at the bottom of the batch do not appear.

Display this tab by default. To indicate which tab appears first when you open a batch, select Distribution, Attributes, or Notes. These tabs appear at the bottom of a batch to show transaction detail.

Note: You can also select to show or hide batch details on the batch screen.

Display batch details. If you want batch details to automatically appear each time you open a batch, select Yes. Batch details include the **Default set** field, **Batch Notes** text box, **Automatically create balancing interfund entries** checkbox, and **Create bank adjustments when posting to a bank's cash account** checkbox.

Display first row of batch as default row. To set default information in the first row of a batch, select Yes. You can easily use these defaults in subsequent batch rows. If you do not want to use default information, select No.

Enter batch defaults. If you want default information to appear in fields automatically when you select a new row, select by row when placing cursor in row. If you want to specify when to enter default information on a field-by-field basis, select by field with the **F2** key.

Note: You can change the defaults on a specific batch at any time.

Load this default set on all batches. To specify a default set containing transaction information, click the binoculars and select a set. If you do not have a defined set, click **New** on the Field default sets screen to create a set. For more information about default sets, see the Program Basics chapter.

Journal Entry Processes

For Journal Entry Processes options, you can specify when to validate data entry, whether to display confirmation messages before posting, whether to display a success message after post validation, whether to automatically create balancing interfund entries, and whether to create bank adjustments when posting to a bank's cash account.
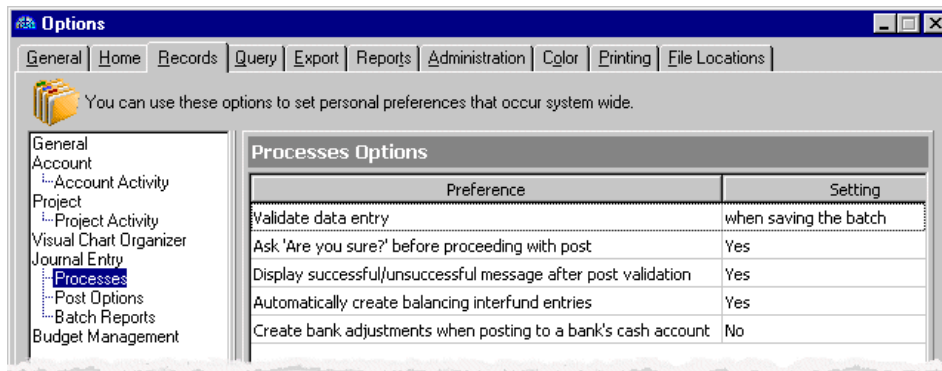
Validate data entry. Specify for the program to validate data entry row by row when the information is entered or only when saving the batch.

Ask 'Are you sure?' before proceeding with post. If you want the program to display a confirmation message before posting, select Yes.

Display successful/unsuccessful message after post validation. If you want the program to display a message confirming post validation, select Yes.

Automatically create balancing interfund entries. If you want the program to automatically create balancing interfund entries, select Yes. You can change this option on the batch screen when batch detail is showing.

Create bank adjustments when posting to a bank's cash account. If you want to create bank adjustments when posting to a bank's cash account, select Yes. You can change this option on the batch screen when batch detail is showing.

Journal Entry Post

Note: Every default Journal Entry Post option can be manually changed when posting from *Administration*.

For Journal Entry Post Options, you can designate the default post option when posting from *Administration*, the default parameters to use when generating a posting report, the default setting when printing or previewing the posting report, and which printer to use. Setting post options is helpful if you post from *Journal Entry*. Although you can set specific post options on the General Ledger Post screen in *Administration*, the only place to set post options when posting from *Journal Entry* is in **Options**.
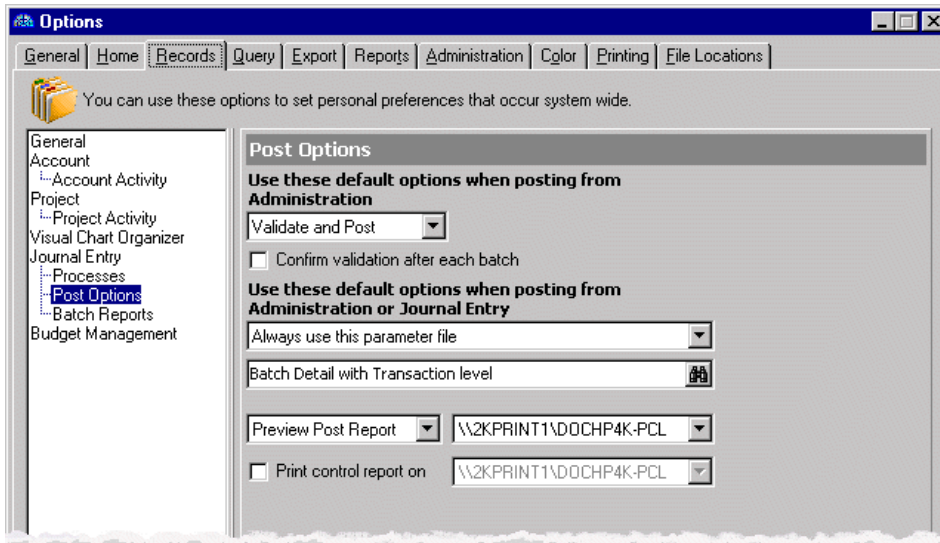
Use these default options when posting from Administration. Select the default posting option: Validate and Post or Validate only.

Confirm validation after each batch. If you want the program to confirm validation results after each batch when posting multiple batches, mark the checkbox.

Note: Using the default Post Report parameters can save you time when you post.

Use these default options when posting from Administration or Journal Entry. If you select Use the default Post Report parameters, the program's default parameters are used. If you select Always ask for a parameter file, each time you post, you receive a message asking which parameter file to use for the report. If you select Always use this parameter file, you must select a parameter file or create a new parameter file to be used.

Note: You can print a report from the Preview screen.

Post printing options. You can view or print a post report after posting. Select to preview the post report or to automatically print the post report. Select the default printer for printing the report.

Print control report on. To print a control report including each batch that was posted, its success status, description, number of transactions, and total debits and credits, mark **Print control report on** and select the printer.

Journal Entry Batch Reports

For the Journal Entry Batch Reports option, you can select to use the batch report in detail or summary when printing from *Journal Entry*. Also, you can select the default report parameters.
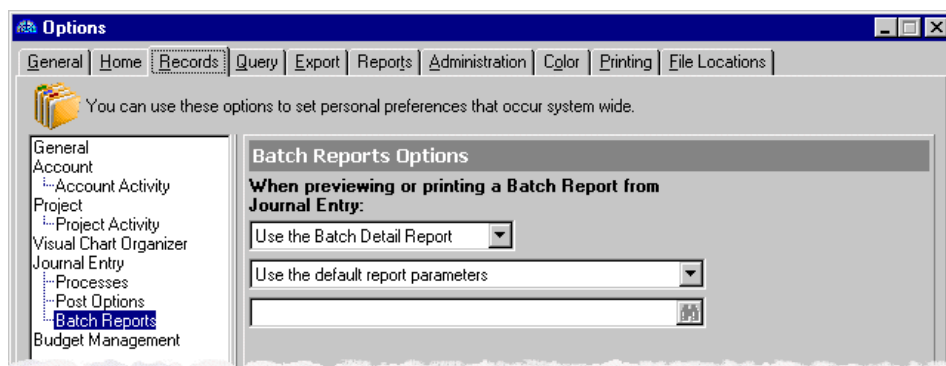
When previewing or printing a Batch Report from Journal Entry. Select whether to use the batch report in detail or summary.

> **Note:** When you select Always use this parameter file, the Select a Parameter File screen appears for you to make the default parameter file selection.

Report parameter options. If you select Use the default report parameters, the program's default parameters are used. This can save you time when printing a batch report. If you select Always ask for a parameter file, each time you print a batch report from *Journal Entry*, you receive a message asking which parameter file to use for the report. If you select Always use this parameter file, you must select a parameter file or create a new parameter file to be used.

Budget Management

If you have the optional module *Budget Management*, you can define default options for budgets. For example, you can set a default scenario, a default fiscal year, and a default project ID.
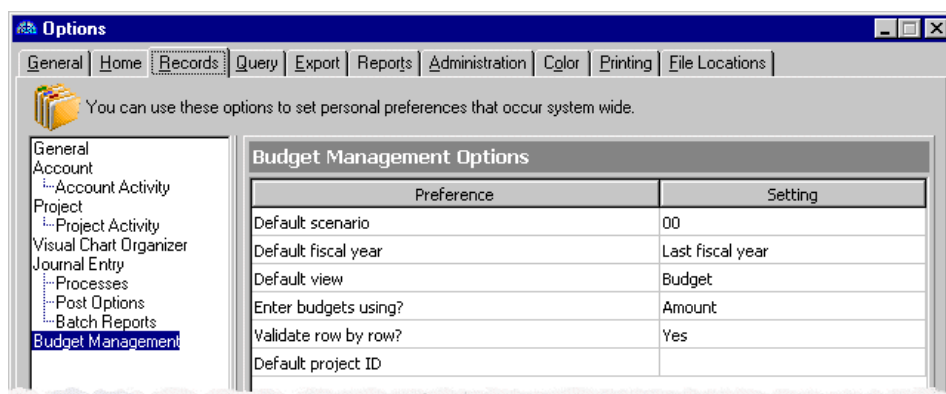
Default scenario. To set a scenario for automatic use each time you create a new budget, select a scenario ID. When you create a new budget, you can change the scenario ID manually.

Default fiscal year. To set a fiscal year for automatic use each time you create a new budget, select Last fiscal year, This fiscal year, or Next fiscal year. This fiscal year refers to the current fiscal year.

Default view. If you have the optional module *Projects and Grants*, you can set the default view that appears when the budget entry grid opens. Select Budget, Account, or Project.

Note: You can change the default settings at any time.

Enter budgets using? To define the default format when entering budgets, select Amount or Percent.

Validate row by row? Specify for the program to validate data entry row by row when the information is entered or only when saving the batch.

Default project ID. If you have the optional module *Projects and Grants*, you can select a default project ID to appear when you open a project budget.

Grant

Note: Grant appears as a selection in the tree view only if you have the optional module *Projects and Grants*.

For Grant options on the Records tab, select the tab to appear first when you open a grant record.
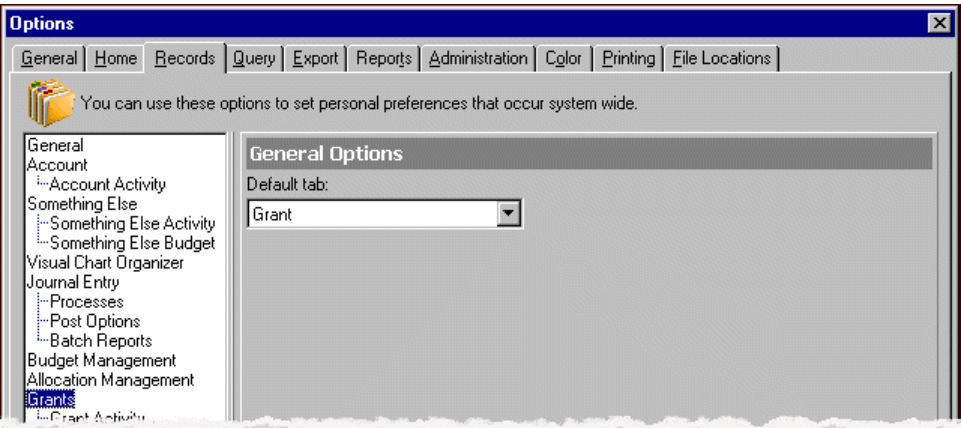
Grant Activity

Note: Grant Activity appears as a selection in the tree view only if you have the optional module *Projects and Grants*.

For Grant Activity options on the Records tab, select default values to appear on the Activity tab of grant records. For example, you can set defaults for display format, activity type, and fiscal years.
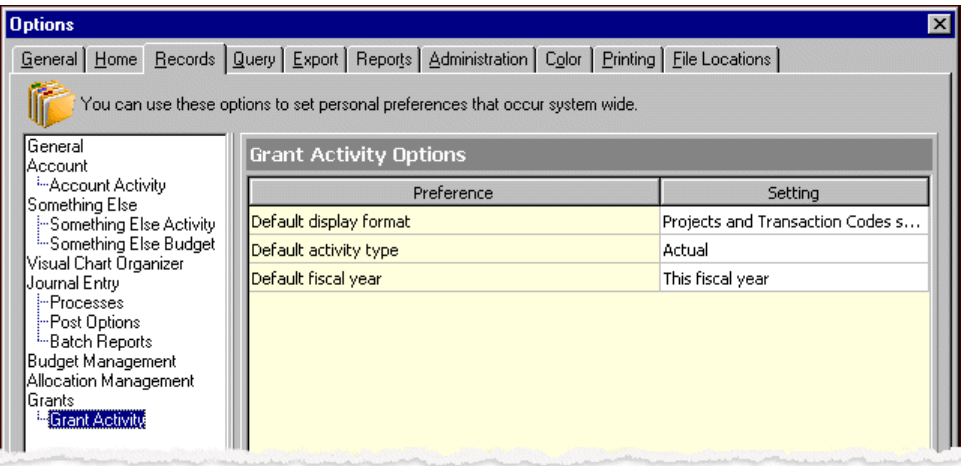
Default display format. To define the default for the display format, you can select Projects and Transaction Codes Separately or Projects and Transaction Codes Combined.

Default activity type. To define default activity type, you can select Actual, Encumbrance, or Both.

Default fiscal year. To define the default for the fiscal year, you can select Last fiscal year, This fiscal year, or Next fiscal year. This fiscal year refers to the current fiscal year.

Accounts Payable Records Options

Note: You must have the optional module *Purchase Orders* installed to use purchase orders and receipts.

The settings you define on the Records tab of the Options screen in *Accounts Payable* affect vendor, invoice, credit memo, purchase order, and receipt records. For example, you can designate how activity appears on records, and you can set defaults to make data entry quicker and more consistent.

General

For General options on the Records tab, designate how you want to select the vendor when creating transactions. If you select Vendor name, you must enter or find the vendor's name each time you create an invoice, credit memo, or other transaction. If you select Vendor ID, you must enter or find the Vendor ID each time.
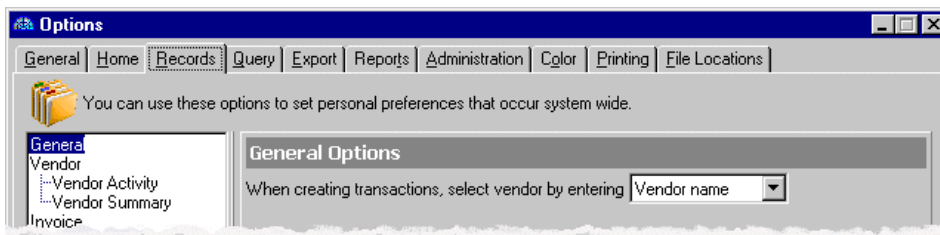
Vendor

Note: If you have the optional module *Purchase Orders*, additional items appear from which you can select the default tab.

For Vendor options on the Records tab, select the tab to appear first when you open a vendor record.
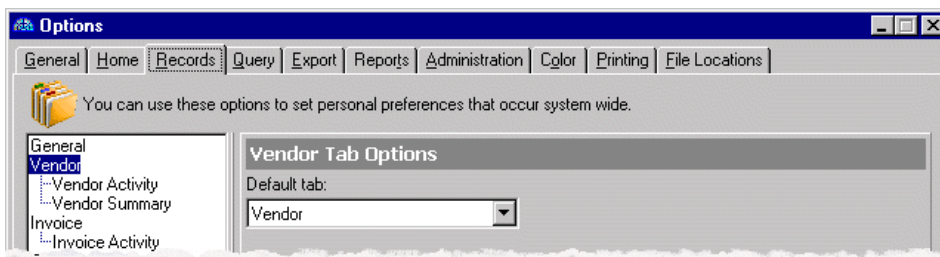
Vendor Activity

For Vendor Activity options on the Records tab, designate if you want the program to show deleted transactions and select default dates of vendor activity to show.
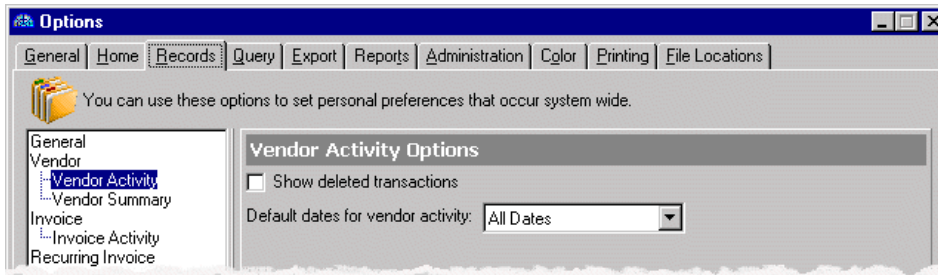
Show deleted transactions. To view deleted, posted transactions on the vendor Activity tab, mark the checkbox. You cannot view deleted transactions that were never posted.

Default dates for vendor activity. Select the date period of activity you want to appear in the grid on the vendor Activity tab. This setting is just a default and can easily be changed on individual vendor records.

Vendor Summary

For Vendor Summary options on the Records tab, select default date values to use when you view summary vendor information. To view a vendor summary, click **Summary** on the action bar of the vendor Activity tab.
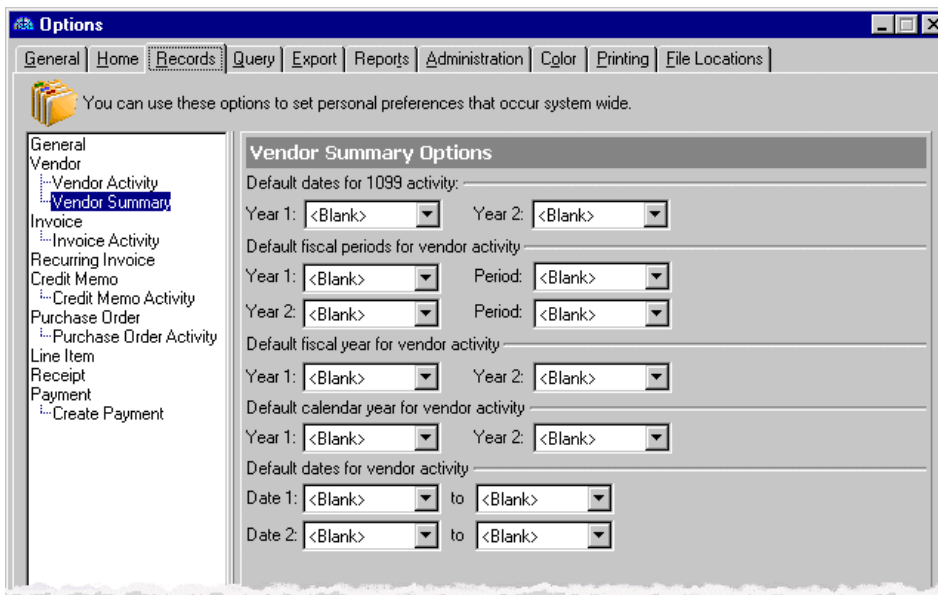
Note: Although you set defaults in **Options**, you can manually change the selections on the Summary screen.

Default dates for 1099 activity. On the Summary screen when 1099 is selected, the years you select in the **Year 1** and **Year 2** fields appear next to each other, providing a comparison of 1099 vendor activity over two years.

Default fiscal periods for vendor activity. The fiscal periods and years you select appear on the Summary screen when Activity is selected on the action bar and Fiscal Periods is selected in the **Display** field.

Default fiscal year for vendor activity. The fiscal years you select appear on the Summary screen when Activity is selected on the action bar and Fiscal Years is selected in the **Display** field.

Default calendar year for vendor activity. The calendar years you select appear on the Summary screen when Activity is selected on the action bar and Calendar Years is selected in the **Display** field.

Default dates for vendor activity. The date ranges you specify appear on the Summary screen when Activity is selected on the action bar and Specific Dates is selected in the **Display** field.

Invoice

For Invoice options on the Records tab, select the tab to appear first when you open an invoice record.
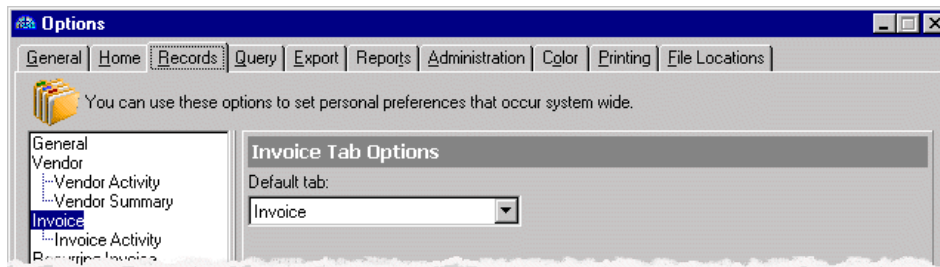
Invoice Activity

For Invoice Activity options on the Records tab, select default values for invoices. For example, you can set default invoice dates and post information.
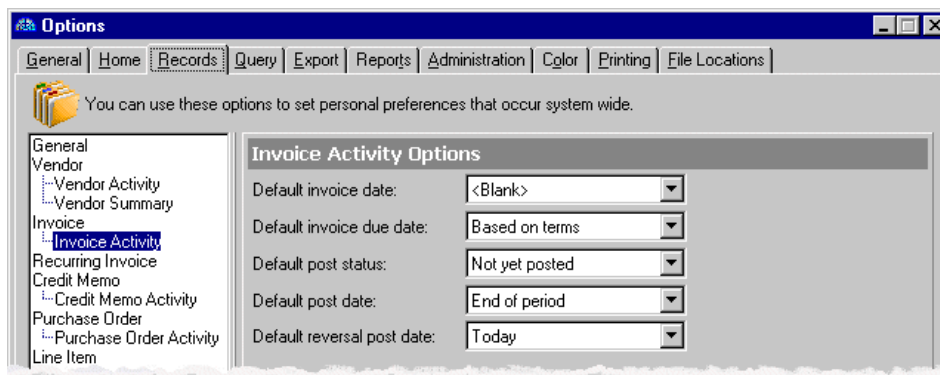
Default invoice date. For the invoice date of a new invoice to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Invoice tab of each new invoice.

> **Note:** Terms are defined in *Configuration* and set on each vendor record.

Default invoice due date. You can select to use the invoice date or the current date as the invoice due date. If you select <Blank>, the due date must be entered on the Invoice tab of each new invoice. If you have payment terms set for the vendor, you can select Based on terms and the due date appears on the invoice record as soon as you select a vendor.

> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. Set the default post date to be the current date or the invoice date, or select <Blank> to require the post date to be entered manually on each new invoice.

Default reversal post date. Set the default reversal post date to be the current date or the invoice date, or select <Blank> to require the date to be entered manually when you delete an unpaid, posted invoice.

Recurring Invoice

For Recurring Invoice options on the Records tab, select the tab to appear first when you open a recurring invoice record.
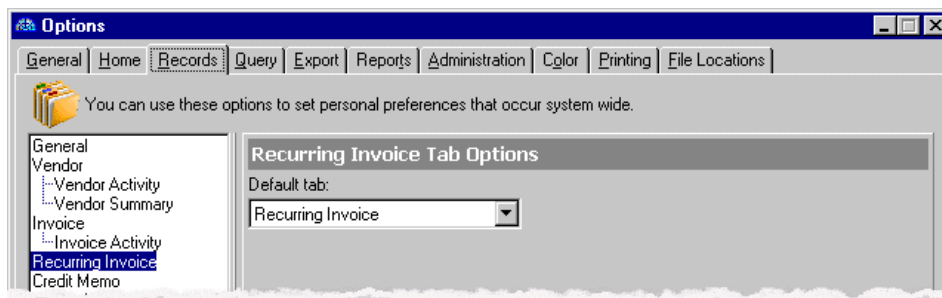
Credit Memo

For Credit Memo options on the Records tab, select the tab to appear first when you open a credit memo record.

Credit Memo Activity

For Credit Memo Activity options on the Records tab, select default values for credit memos. For example, you can set default credit memo dates and post information.
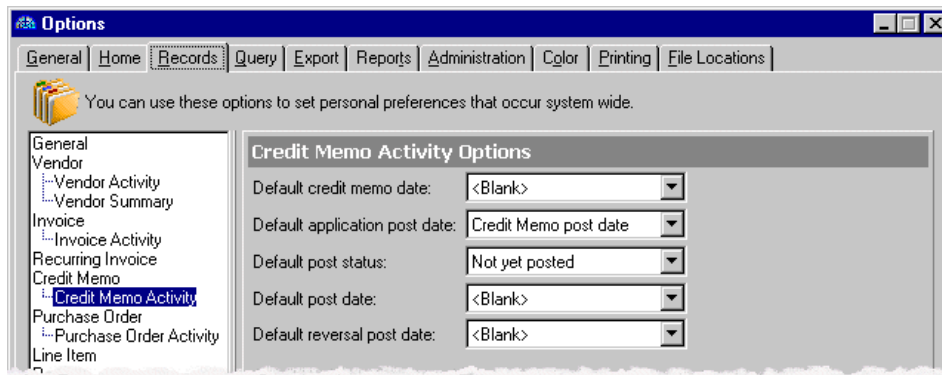
Default credit memo date. For the credit memo date of a new credit memo to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Credit Memo tab of each new credit memo.

Default application post date. You can select Credit Memo post date, Credit Memo date, or System date.

> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.
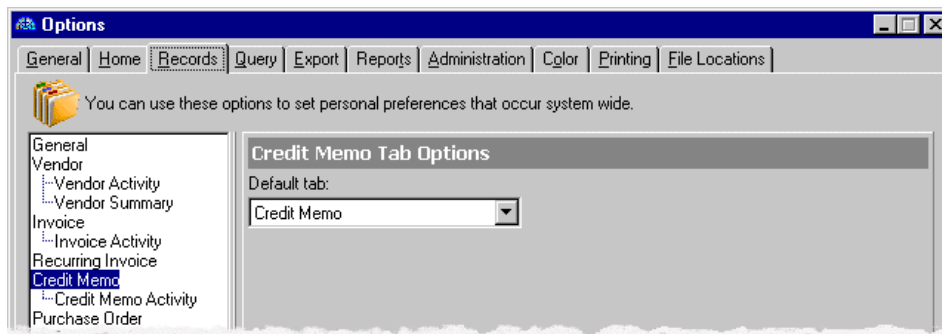
Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. Set the default post date to be the current date or the credit memo date, or select <Blank> to require the post date to be entered manually on each new credit memo.

Default reversal post date. Set the default reversal post date to be the current date or the credit memo date, or select <Blank> to require the date to be entered manually when you delete an unapplied, posted credit memo.

Purchase Order

For Purchase Order options on the Records tab, select the tab to appear first when you open a purchase order record. You must have the optional module *Purchase Orders* to create purchase orders.
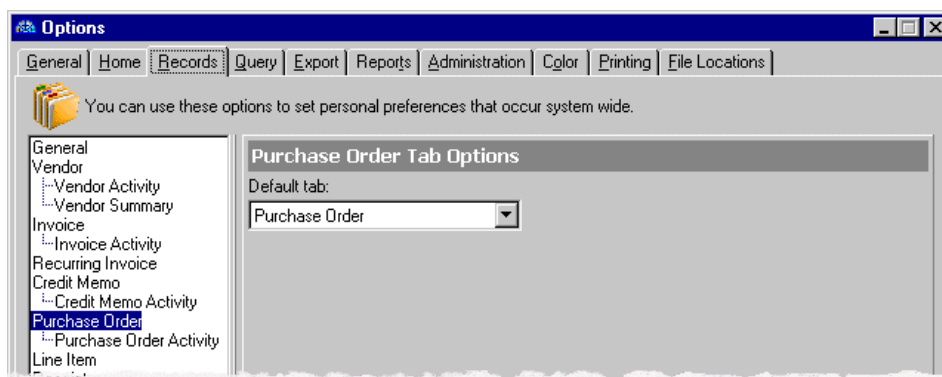
Purchase Order Activity

For Purchase Order Activity options on the Records tab, select a default order date and whether to be notified if a blanket purchase order exists for a product. You must have the optional module *Purchase Orders* to use purchase orders.

Note: The message that a blanket purchase order exists for a product appears after you select the **Product ID** on a new line item.

Prompt if blanket purchase order exists for a product. Mark the checkbox to be informed when a blanket purchase order exists for a product you are adding to a purchase order. This prevents you from creating an unnecessary purchase order and enables you to apply the blanket purchase order on the spot.

Default order date. To set the default order date to the current date, select Today. To require the date to be entered manually each time, select <Blank>.

Line Item

For Line Item options on the Records tab, you can set a default post status, post date, and reversal post date. You must have the optional module *Purchase Orders* to create line items and set line item options.
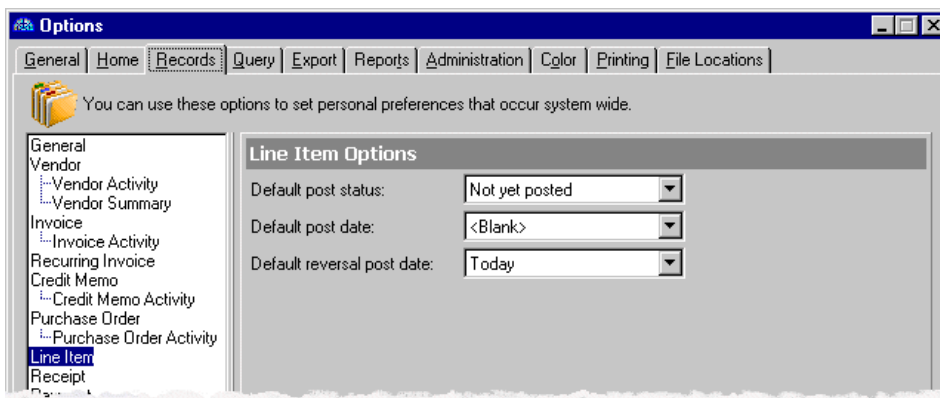
Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.
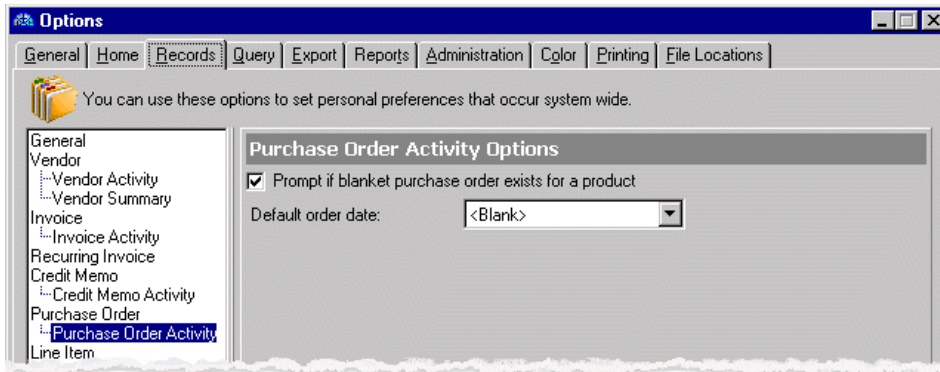
Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. To set the default post date to the current date, select Today. To require the post date to be entered manually on each new line item, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the line item post date. To require the date to be entered manually when you delete a posted line item, select <Blank>.

Receipt

Note: You must have the optional module *Purchase Orders* to use receipts.

For Receipt options on the Records tab, select a default reversal post date and whether to be asked to create an invoice for uninvoiced items.
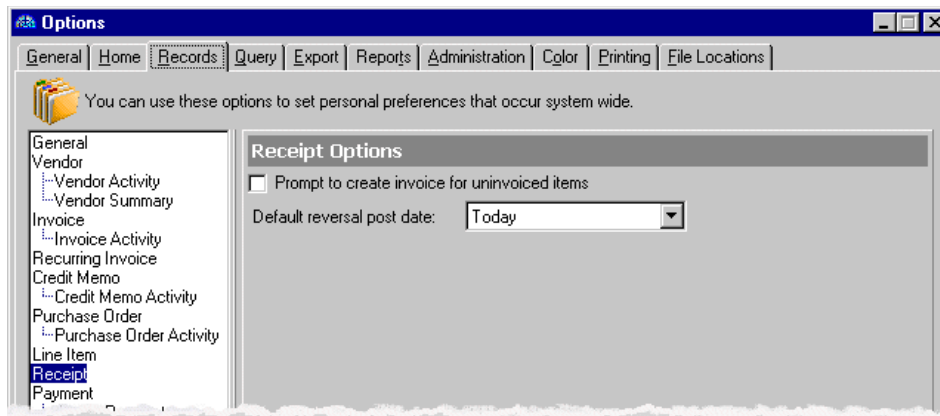
Prompt to create invoice for uninvoiced items. Since a purchase order and receipt can be created for items that have not been invoiced, you can mark this checkbox to receive a warning message before closing a receipt. The program then gives you the option of creating an invoice on the spot for any uninvoiced items or continuing without creating an invoice.

Default reversal post date. You can set the default reversal post date to the current date or the receipt post date.

Payment

For Payment options on the Records tab, specify a default date for voiding a payment, a default reversal post date, and whether or not you want to be warned when recording a one-time check without printing.
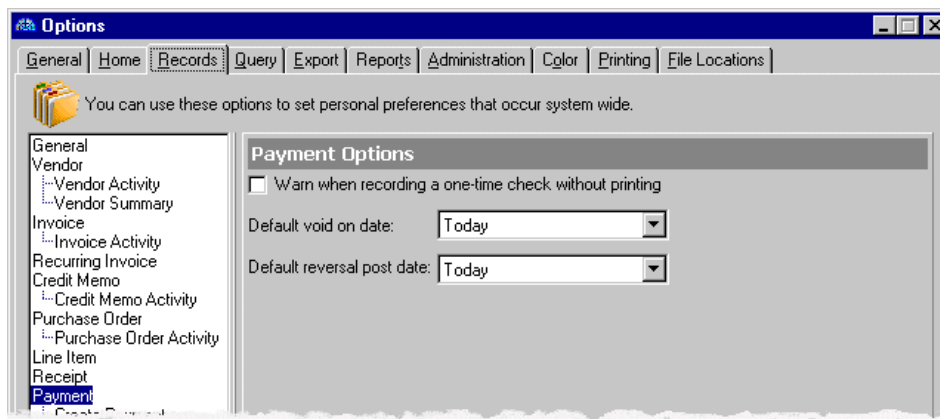
Warn when recording a one-time check without printing. For the program to warn you when you record a one-time check without printing it, mark the checkbox.

Default void on date. To set a default for the payment void date, you can select Today or Payment post date. To require the date to be entered manually when you void a payment, select <Blank>.

> **Note:** The **Void date** and **Reversal post date** fields appear on the Void payment screen.

Default reversal post date. To set a default reversal post date, you can select Today or Payment post date. To require the date to be entered manually when you void a payment, select <Blank>.

Create Payment

For Create Payment options on the Records tab, you can overwrite one-time check formatting options, select to view payment summary information before creating payments, and select Pre-payment report parameters.
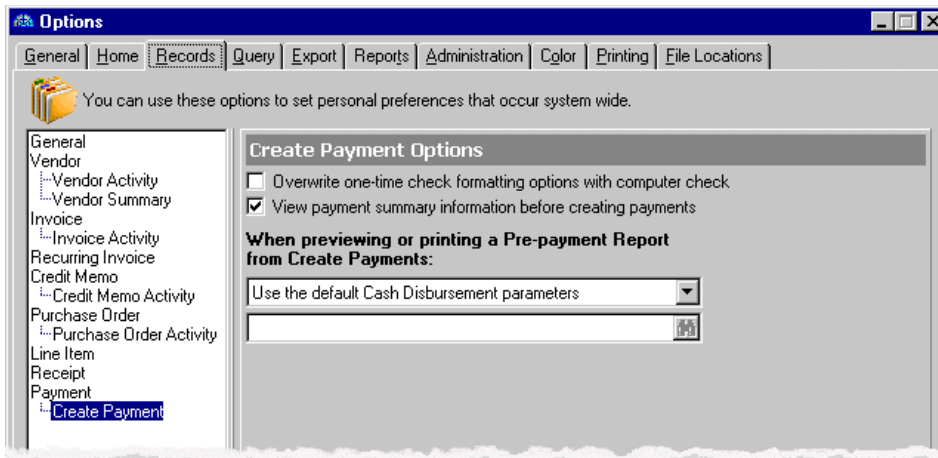

Overwrite one-time check formatting options with computer check. To use the computer check's formatting options when paying a one-time check, mark the checkbox.

View payment summary information before creating payments. To read and verify payment summary information before creating payments, mark the checkbox.

When previewing or printing a Pre-payment Report from Create Payments. To use the program's default parameters, select Use the default Cash Disbursement parameters. To set specific report parameters, select Always use this parameter file, then select a previously created parameter file or create a new parameter file to be used.

Accounts Receivable Records Options

The settings you define on the Records tab of the Options screen in *Accounts Receivable* affect product and billing items, clients, charges, credits, invoices, returns, refunds, deposits, and payments. For example, you can set defaults to make data entry quicker and more consistent.

General

For General options on the Records tab, you can select general default data entry options for transactions.

Show these fields when entering new invoices, charges, and credits. Mark checkboxes for the client fields to appear. You can use the up and down arrows to change the order in which the fields appear.

Use this category for new transactions. Select a default category to use for new transactions.

Show these fields when entering new Accounts Receivable receipts. Mark checkboxes for the fields to appear. You can use the up and down arrows to change the order in which the fields appear.

Enter trade discounts using. Mark **Amount** or **Percentage** to select how to enter trade discounts on records.

Charge/Line Item

With the Charge/Line Item Options, you select the appearance of the applications screen accessed through charges and line items.

Show every other application row using this color [ ]. Mark this box to alternate colors of rows on the application screen. Select a color from the submenu or click on the palette icon to define your own color.

Show this menu option by default when the application screen is first opened. Select the menu option that you would like to appear on the application screen for charges and line items. Other options are available from the applications screen by clicking the down arrow next to your selection.

Show columns in this order on the applications screen. Select an item use the up and down arrow buttons to move column in the order you want them to appear on the applications screen.

Restore Default Column Order. Click this button to restore the column order to system defaults.

Payment/Credit

With the Payment/Credit Options, you select the appearance of the applications screen accessed through payments and credits.

Show every other application row using this color [ ]. Mark this box to alternate colors of rows on the application screen. Select a color from the submenu or click on the palette icon to define your own color.

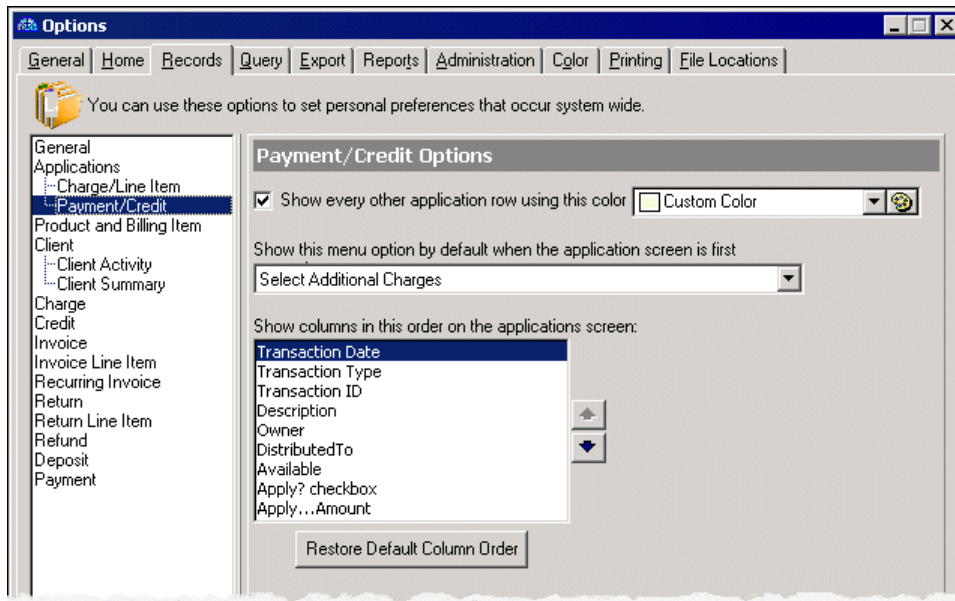**Show this menu option by default when the application screen is first opened.** Select the menu option that you would like to appear on the application screen for charges and line items. Other options are available from the applications screen by clicking the down arrow next to your selection.

Show columns in this order on the applications screen. Select an item use the up and down arrow buttons to move column in the order you want them to appear on the applications screen.

Restore Default Column Order. Click this button to restore the column order to system defaults.

Product and Billing Item

For Product and Billing Item options on the Records tab, select the type you add most frequently as the default: Flat Rate Item, Per Usage Item, Finance Charge Item, Sales Tax Item, Refund Item, or Product. For example, select Refund Item. On the Products and Billing Items page in *Records*, **New Refund Item** appears on the action bar. You can click the down arrow beside **New Refund Item** to access the new screens for the other types.
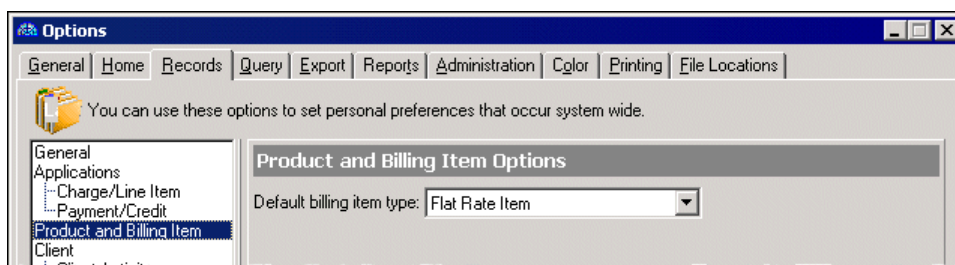
Client

For Client options on the Records tab, select the tab to appear first when you open a client record.
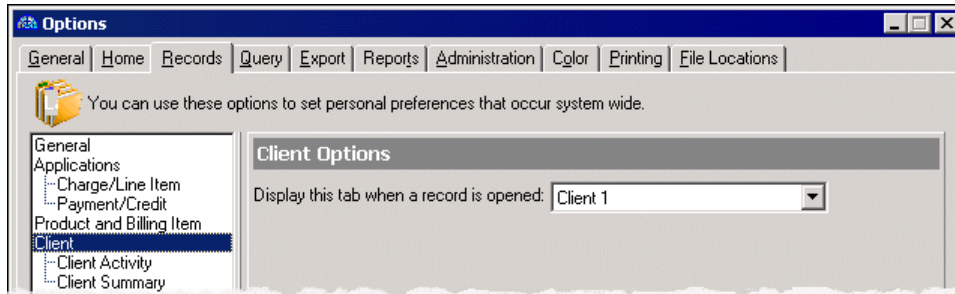
Display this tab when a record is opened. Select the tab to appear first when you open a client record: Client 1, Client 2, Defaults, Addresses, Activity, Attributes, Media, Notes, Actions, Statements, Relationships, Payers or History.

Client Activity

For Client Activity options on the Records tab, you can select to include deleted transactions and set display options for the Activity tab of client records.
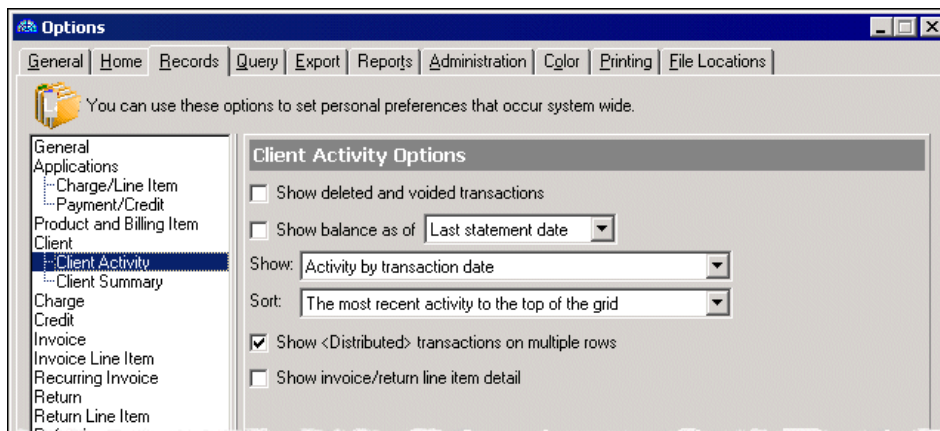
Show deleted transactions. To view deleted, posted transactions on the client Activity tab, mark the checkbox. You cannot view deleted transactions that were never posted.

Show balance as of. Select to show the balance on the Activity tab by last statement date, last calendar year, last fiscal year, last fiscal period, or the current date.

Show. Select to show activity by transaction date or to show payments/credits with their associated charges.

Sort. Select to show the most recent or the oldest activity at the top of the grid.

Show <Distributed> transactions on multiple rows. To default the **Show "<Distributed> transactions on multiple rows** checkbox on clients' Activity tab to be marked, mark this box. You can unmark the box on the Activity tab.

Show invoice/return line item detail. To default the **Show invoice/return line item detail** checkbox on clients' Activity tab to be marked, mark this box. You can unmark the box on the Activity tab.

Client Summary

For Client Summary options on the Records tab, set display options for viewing summary client information. To view a client summary, from a client record, click **Summary** on the action bar of the client Activity tab.
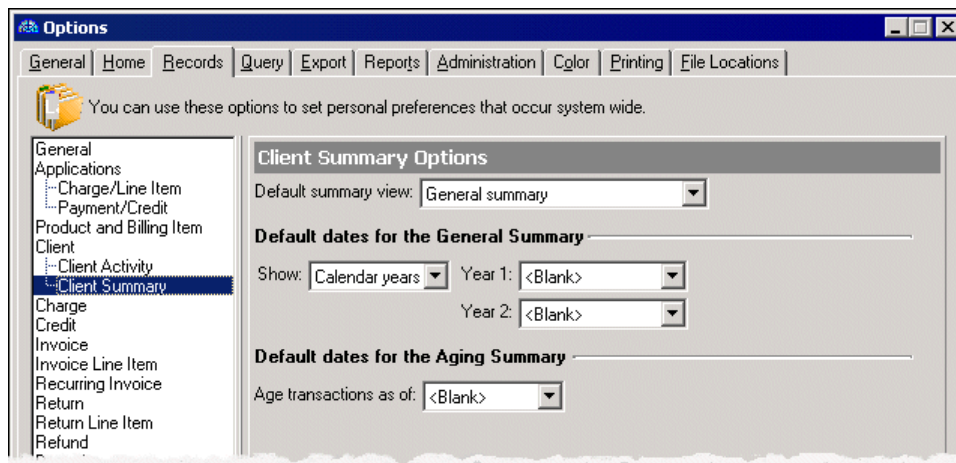
Default summary view. Select the default summary view: General summary, Recent activity, Aging summary, or Lifetime statistics. You can change the view on the Summary screen.

Default dates for the General Summary. Select to show dates by calendar years, fiscal years, or fiscal periods. These are default dates, you can change this on the Summary screen.

Default dates for the Aging Summary. For the Aging Summary, you can select for the current or previous date to automatically default in the **Age transactions as of** field, or select <Blank> to require the date to be entered manually.

Charge

For Charge options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a charge record: Transaction, GL Distribution, Payments/Credits, or Attributes/Notes.

Default charge date. For the transaction date of a new charge to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Transaction tab of each new charge.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, charge date, or the last date of the current fiscal period. To require the post date to be entered manually on each new charge record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the charge post date. To require the date to be entered manually when you delete a charge, select <Blank>.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Credit

For Credit options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a credit record: Transaction, GL Distribution, Applied To, or Attributes/Notes.

Default credit date. For the transaction date of a new credit to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Transaction tab of each new credit.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

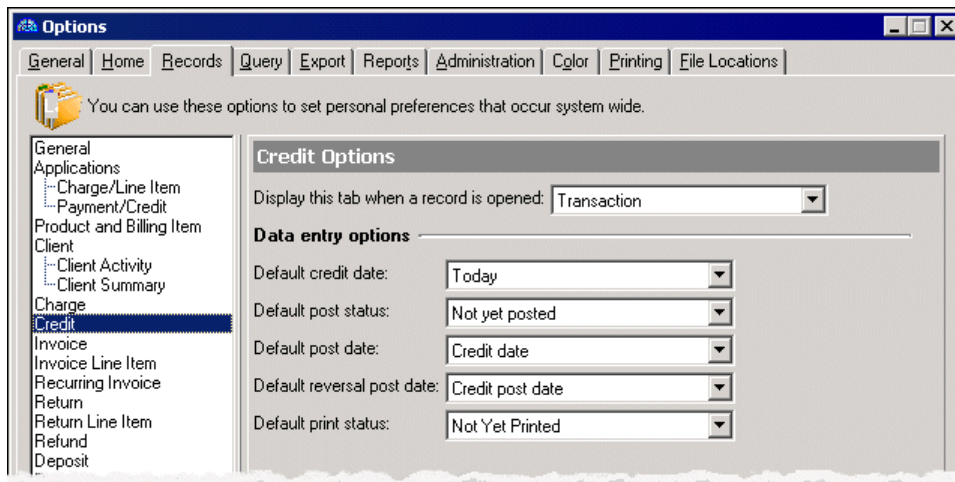**Default post status.** You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, credit date, or the last date of the current fiscal period. To require the post date to be entered manually on each new credit record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the credit post date. To require the date to be entered manually when you delete a credit, select <Blank>.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Invoice

For Invoice options on the Records tab, you can select the default tab and set data entry defaults.
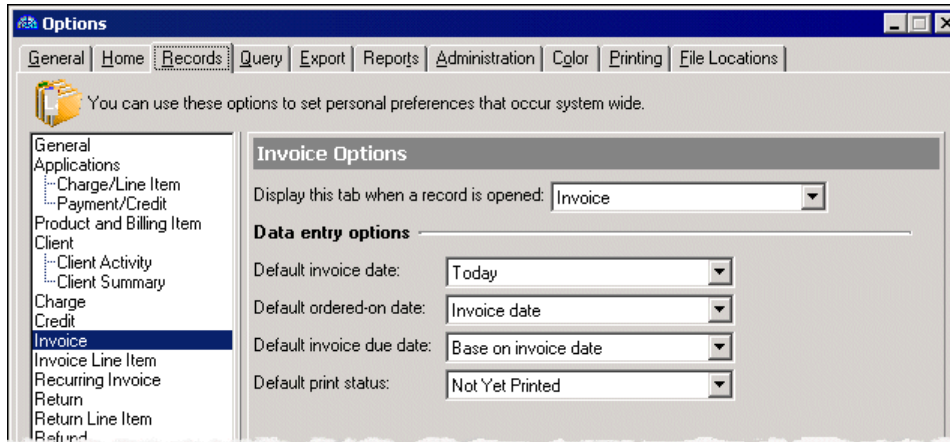
Display this tab when a record is opened. Select the tab to appear first when you open an invoice record: Invoice, Line Items, Payments/Credits, or Attributes/Notes.

Default invoice date. For the invoice date of a new invoice to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Invoice tab of each new invoice.

Default ordered-on date. You can set the default order date to the current date or the invoice date. If you select <Blank>, the date must be entered in the **Ordered on** field on the Invoice tab of each new invoice.

Default invoice due date. You can set the default due date to be based on the invoice date or the ordered-on date. To require the invoice due date to be entered manually on each new invoice, select <Blank>.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Invoice Line Item

For Invoice Line Item options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open an invoice line item record: Line Item, GL Distribution, Payments/Credits, or Notes.

Default line item date. For the transaction date of a new invoice line item to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Line Item tab of each new line item.

> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

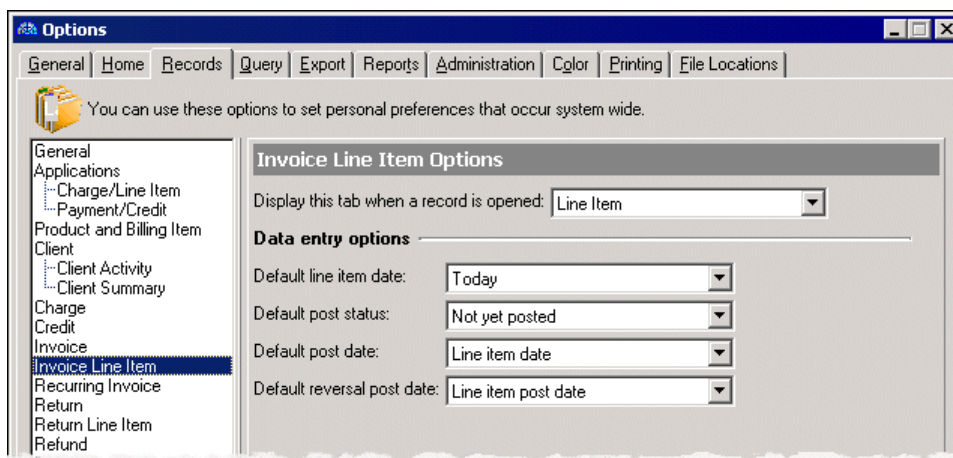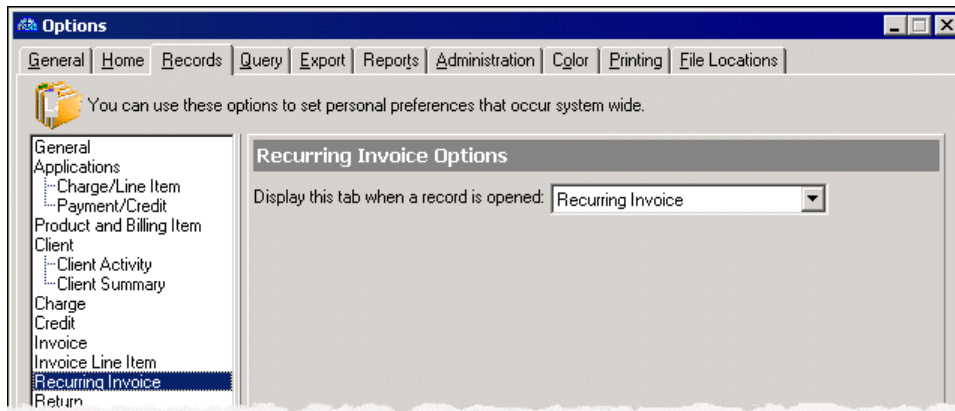**Default post status.** You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, line item date, or the last date of the current fiscal period. To require the post date to be entered manually on each new invoice line item record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the line item post date. To require the date to be entered manually when you delete an invoice line item, select <Blank>.

Recurring Invoice
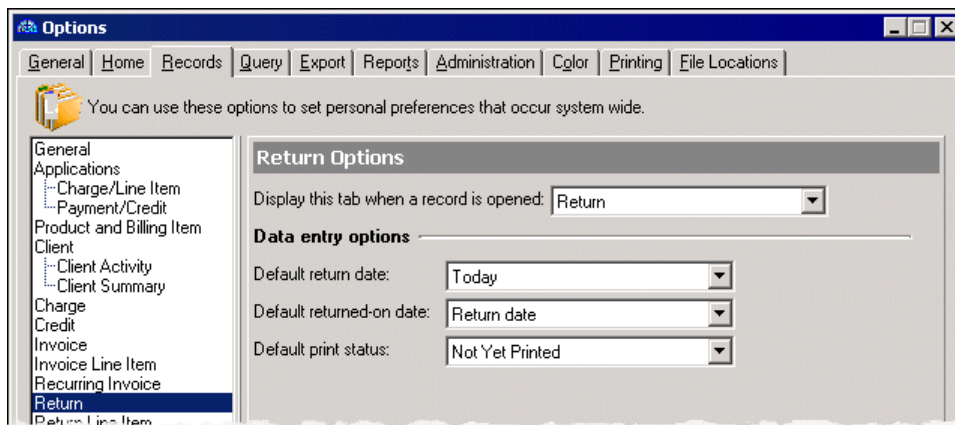
For Recurring Invoice options on the Records tab, select the tab to appear first when you open a recurring invoice record.

Return

For Return options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a return record: Return, Line Items, or Attributes/Notes.
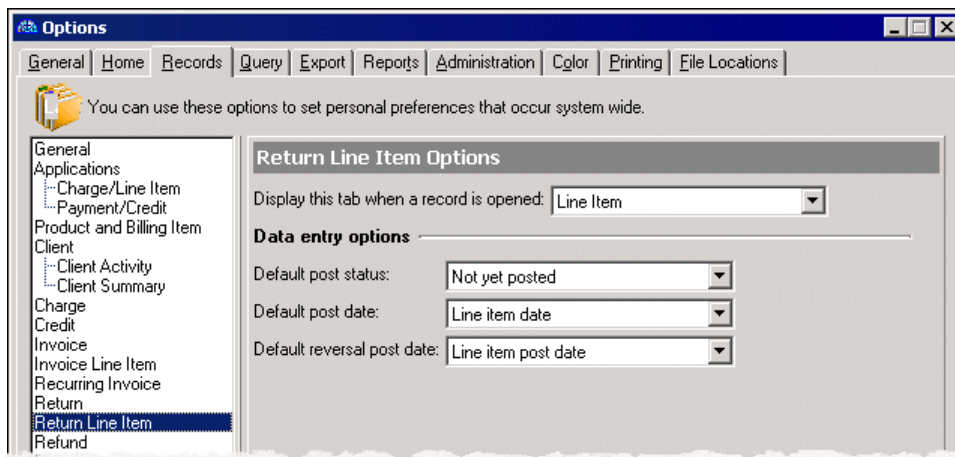
Default return date. For the return date to default to the current date, select Today. If you select <Blank>, the date must be entered on the Return tab of each new return.

Default returned-on date. You can set the default returned-on date to the current date or the return date. If you select <Blank>, the date must be entered in the **Returned on** field on the Return tab of each new return.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Return Line Item

For Return Line Item options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a return line item record: Line Item, GL Distribution, Applied To, or Attributes/Notes.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, line item date, or the last date of the current fiscal period. To require the post date to be entered manually on each new return line item record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the line item post date. To require the date to be entered manually when you delete a return line item, select <Blank>.

Refund

For Refund options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a refund record: Refund, GL Distribution, Payments/Credits, or Attributes/Notes.

Default refund date. For the refund date to default to the current date, select Today. If you select <Blank>, the date must be entered on the Refund tab of each new refund.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.
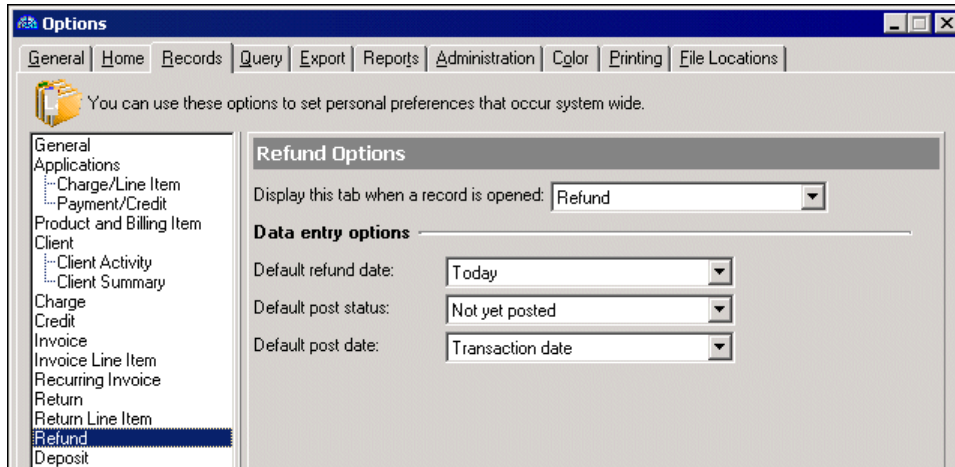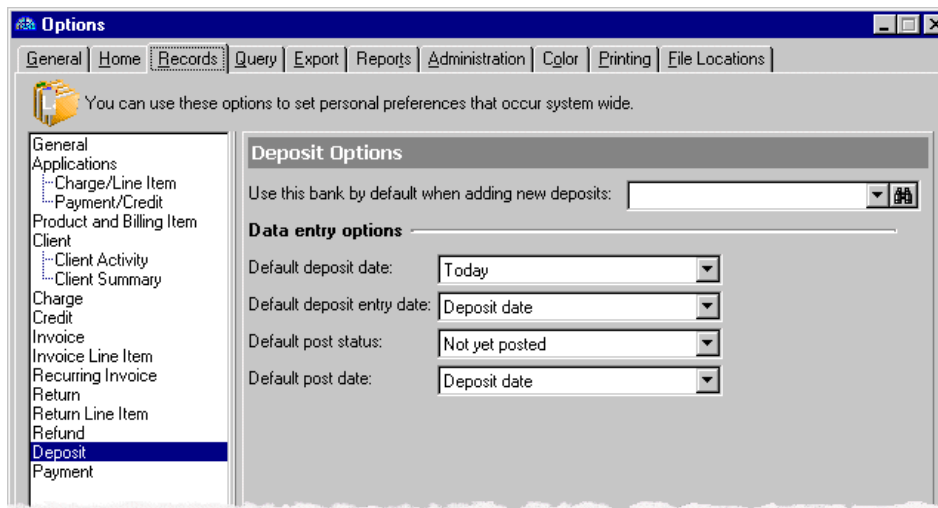
Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, transaction date, or the last date of the current fiscal period. To require the post date to be entered manually on each new refund record, select <Blank>.

Deposit

For Deposit options on the Records tab, you can select a default bank and set data entry defaults.

Use this bank by default when adding new deposits. Select the bank you use most frequently for new deposits.

Default deposit date. For the deposit date to default to the current date, select Today. If you select <Blank>, the date must be entered manually.

Default deposit entry date. You can set the default deposit entry date to the current date or the deposit date. If you select <Blank>, the date must be entered manually.
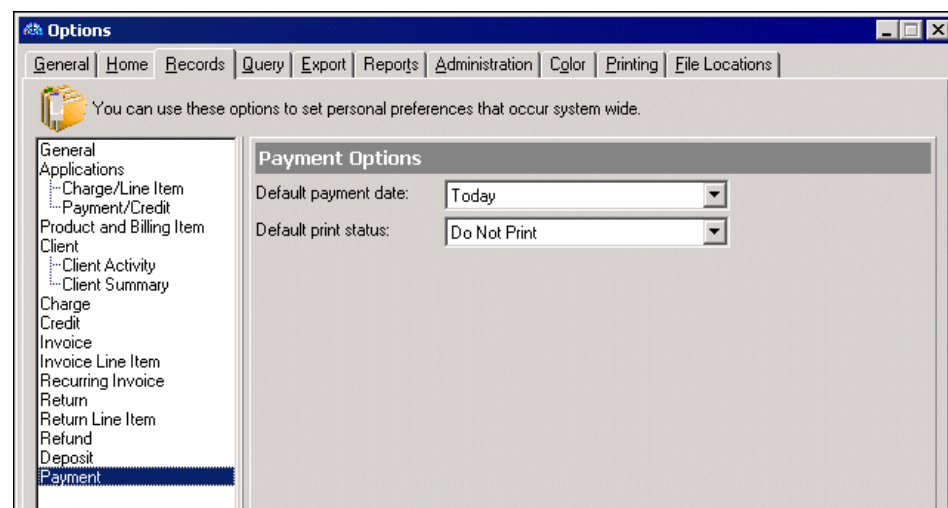
> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, deposit date, or the last date of the current fiscal period. To require the post date to be entered manually on each new deposit record, select <Blank>.

Payment

For Payment options on the Records tab, you can set the default values for payment records.

Default payment date. Select the default payment date for new payments. If you select <Blank>, the date must be entered manually.
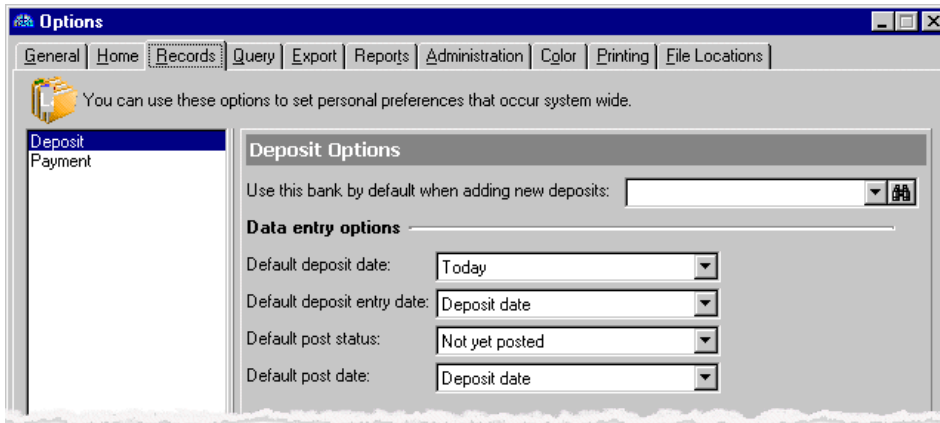
Default print status. Select the default print status for new payments.

Cash Receipts Records Options

The settings you define on the Records tab of the Options screen in *Cash Receipts* affect deposits and payments. For example, you can set defaults to make data entry quicker and more consistent.

Deposit

For Deposit options on the Records tab, you can select a default bank and set data entry defaults.

Use this bank by default when adding new deposits. Select the bank you use most frequently for new deposits.

Default deposit date. For the deposit date to default to the current date, select Today. If you select <Blank>, the date must be entered manually.

Default deposit entry date. You can set the default deposit entry date to the current date or the deposit date. If you select <Blank>, the date must be entered manually.
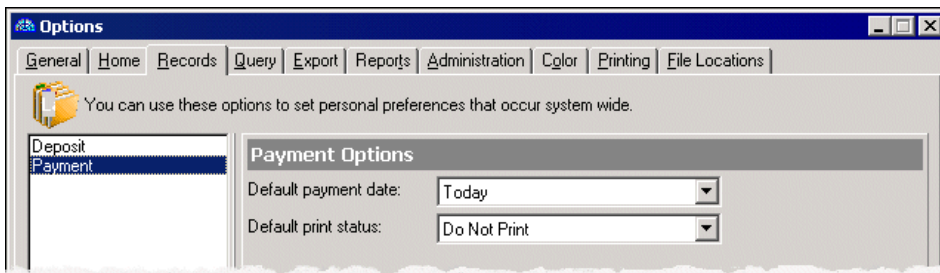
> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, deposit date, or the last date of the current fiscal period. To require the post date to be entered manually on each new deposit record, select <Blank>.

Payment

For Payment options on the Records tab, you can set the default values for payment records.

Default payment date. Select the default payment date for new payments. If you select <Blank>, the date must be entered manually.

Default print status. Select the default print status for new payments.

Fixed Assets Records Options

The settings you define on the Records tab of the Options screen in **_Fixed Assets_** affect asset and transaction records. For example, you can designate the Asset Wizard as the primary entry method when creating new assets, and you can set default dates for asset and transaction activity.

General

For General options on the Records tab, you can choose to enter assets through the Asset Wizard by default, select the type of asset identifier to use when creating transactions, and set the text for the asset record title bar. Also, you can add new fields to appear in the title bar.
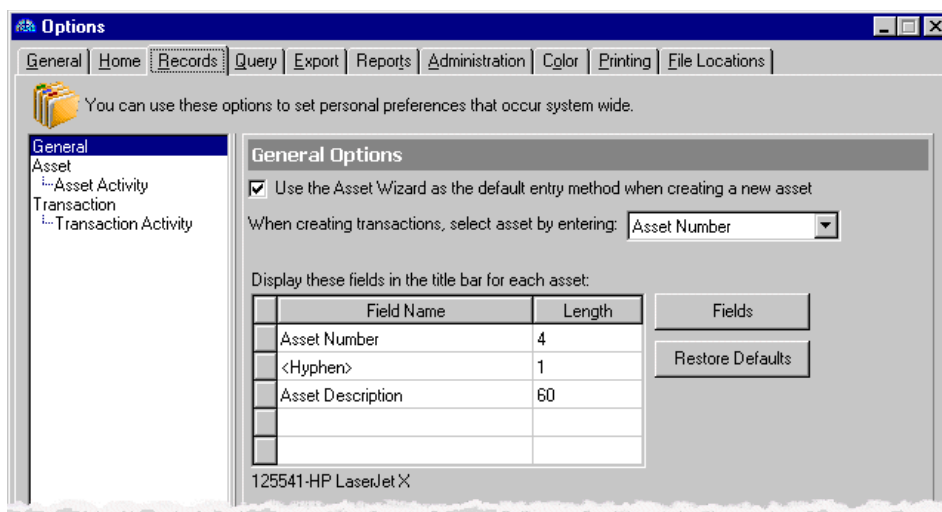
Note: The Asset Wizard enables you to add more than one asset at a time. If you want to add very detailed information, you may want to add assets using the normal asset record.

Use Asset Wizard as default entry method when creating new assets. If you mark this checkbox, **Add a New Asset using the Asset Wizard** is the first selection on the Assets page in _Records_. Also, when you click **New** on the Asset List, the Wizard automatically appears. You access the Asset List by clicking **View All Assets** on the Assets page in _Records_.

When creating transactions, select asset by entering [ ]. If you select Asset Number, you must enter or find the asset number each time you create a transaction. If you select Asset ID, you must enter or find the asset ID each time you create a transaction.

Display these fields in the title bar for each asset. This grid enables you to control the information appearing in the title bar of the asset record. It can be helpful if you typically have several asset records open at one time.

Fields. Click this button to define extra fields that you want to use in the title bar of an asset record. Any fields you add on the fly on the Define Asset Titlebar Fields screen appear exactly as they are typed. In the **Field Name** column, click in the next available row and enter the text you want to appear on the Asset title bar.

When you are finished defining new field names, click **OK**. You can then select the new field(s) from the drop-down list in the grid under General Options.
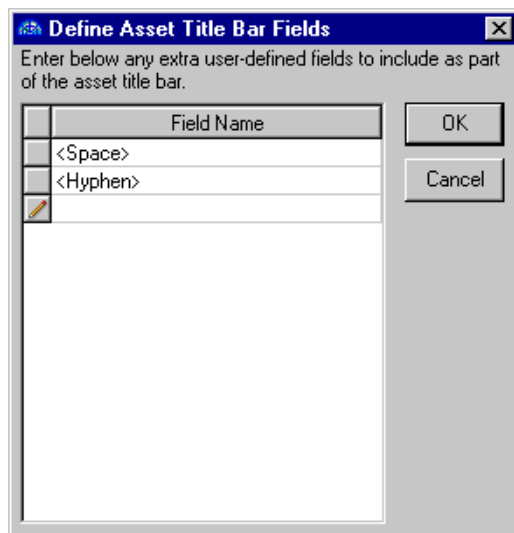
Note: When you click **Reset to System Defaults**, you lose all of your own settings in the grid and they cannot be restored.

Reset to System Defaults. Click this button to return to the original program defaults. When you click **Reset to System Defaults**, you lose all of your own settings in the grid and they cannot be restored.

Asset

For Asset options on the Records tab, you can set the tab that appears first when you open an asset record and specify how to add new descriptions.
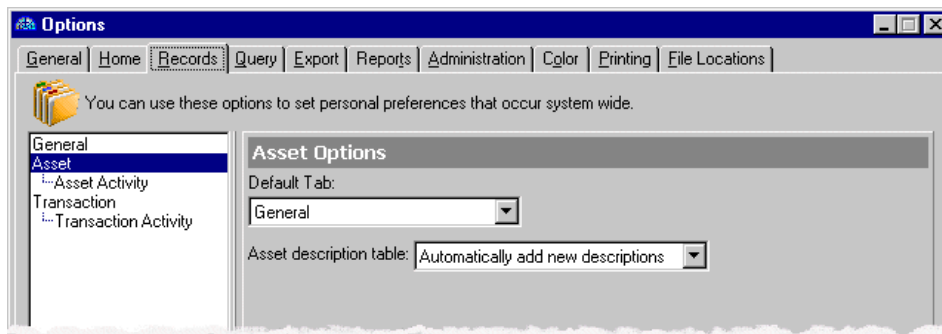
Default Tab. Select the tab to appear first when you open an asset record.

Note: To prevent duplicate descriptions from being added that have a different spelling or word usage, you may want to select Do not add new descriptions or Ask before adding new descriptions.

Asset description table. Asset descriptions are normally defined on the Tables tab of *Configuration*. If you want to be able to add new asset descriptions on the fly while in an asset record, you can select for the program to ask for your confirmation first or to automatically add new descriptions. If you do not want to allow new descriptions to be added from an asset record, select Do not add new descriptions.

Asset Activity

For Asset Activity options, specify the date period of activity to show on the Activity tab and whether to show deleted transactions.
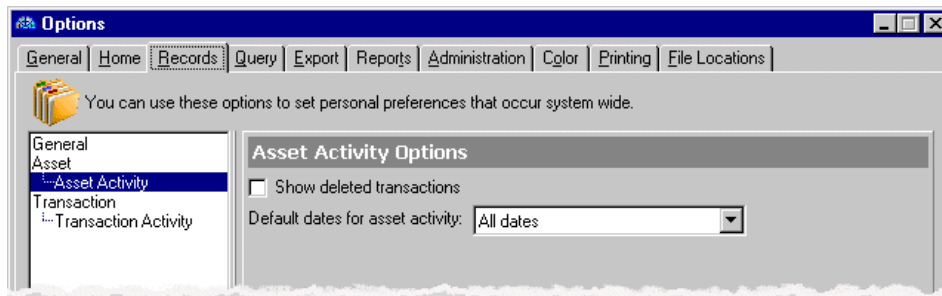

Show deleted transactions. To view deleted, posted transactions on the asset Activity tab, mark the checkbox. You cannot view deleted transactions that were never posted.

Default date for asset activity. Select the date period of activity to appear in the grid on the asset Activity tab. This setting is just a default and can easily be changed within individual asset records.
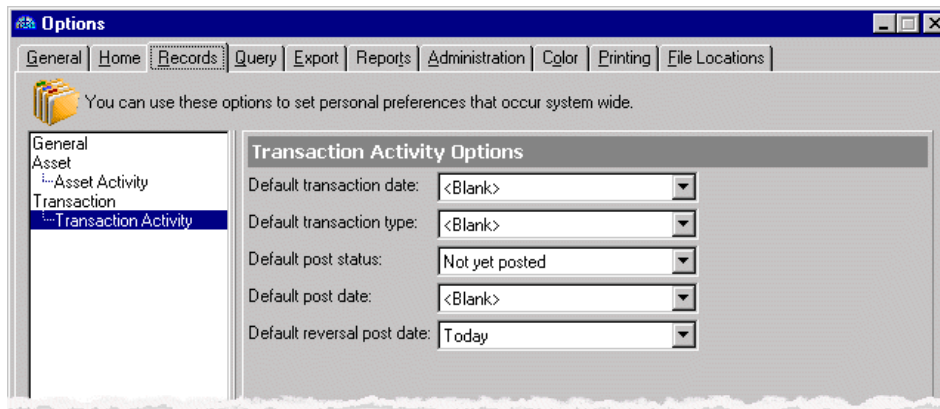
Transaction

For Transaction options, select the tab to appear first when you open a transaction record.
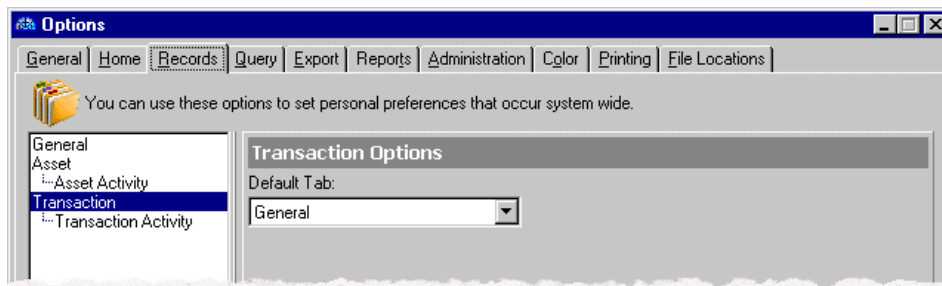
Transaction Activity

For Transaction Activity options on the Records tab, select default values to appear on the Activity tab of transactions. For example, you can set default transaction dates and post information.

Default transaction date. You can select to set the default to a specific transaction date, such as Today, Period end date, or Period start date. If you select <Blank>, the date must be entered on the General tab of each new transaction.

Default transaction type. If you are entering many transactions with the same transaction type, you can save time by selecting a default. This setting can easily be changed within individual transaction records.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. Set a specific default post date or select <Blank> to require the post date to be entered manually on each new transaction.

Default reversal post date. Set a specific default reversal post date or select <Blank> to require the date to be entered manually when you delete a posted transaction.

Student Billing Records Options

The settings you define on the Records tab of the Options screen in **Student Billing** affect students, individuals, organizations, product and billing items, charges, credits, automatic payments, financial aid, advance deposits, refunds, deposits, and payments. For example, you can set defaults to make data entry quicker and more consistent.

General

For General options on the Records tab, you can select general default data entry options for transactions.

Show these fields when entering new charges, invoices, and credits. Mark checkboxes for the record fields to appear in the name grid on charge, invoices, and credit records. You can use the up and down arrows to change the order in which the fields appear.

Use this category for new transactions. Select a default category to use for new transactions.
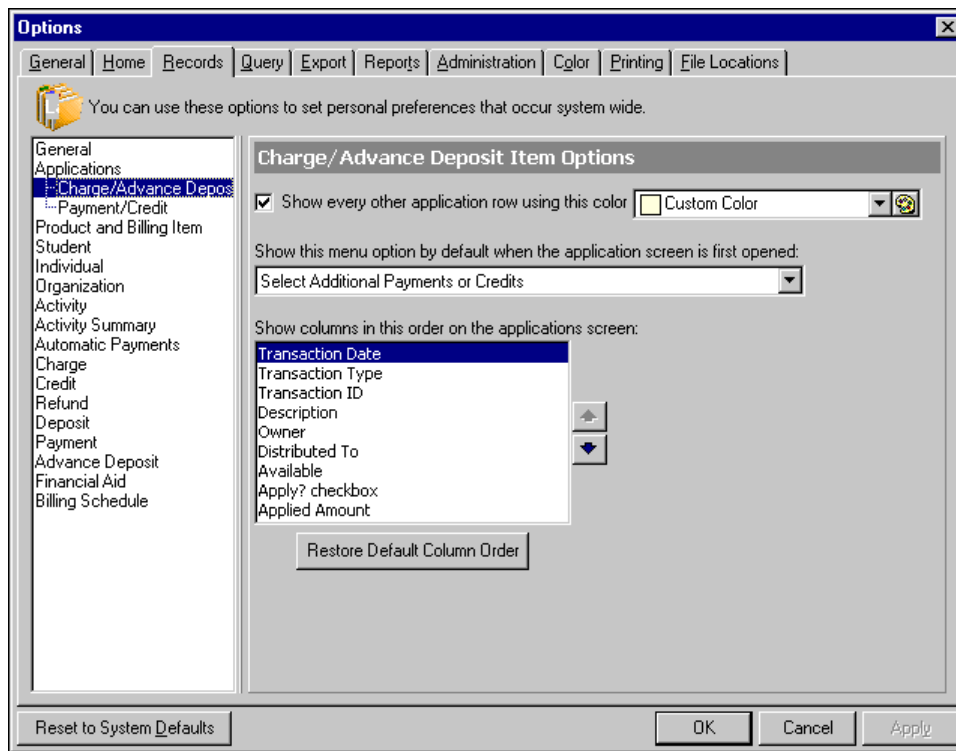
Show these fields when entering new Student Billing receipts. Mark checkboxes for the fields to appear in the name grid on payment records. You can use the up and down arrows to change the order in which the fields appear.

Enter special discounts using. Mark **Amount** or **Percentage** to select how to enter trade discounts on records.

Show account balance with scheduled activity for students, individuals and organizations. Mark this option to include the **Balance with scheduled activity** field in the status bar for student, individual, and organization records.

Charge/Advance Deposit Item

With the Charge/Advance Deposit Item Options, you select the appearance of the applications screen accessed through charges and advance deposit items.

Show every other application row using this color [ ]. Mark this box to alternate colors of rows on the application screen. Select a color from the submenu or click on the palette icon to define your own color.
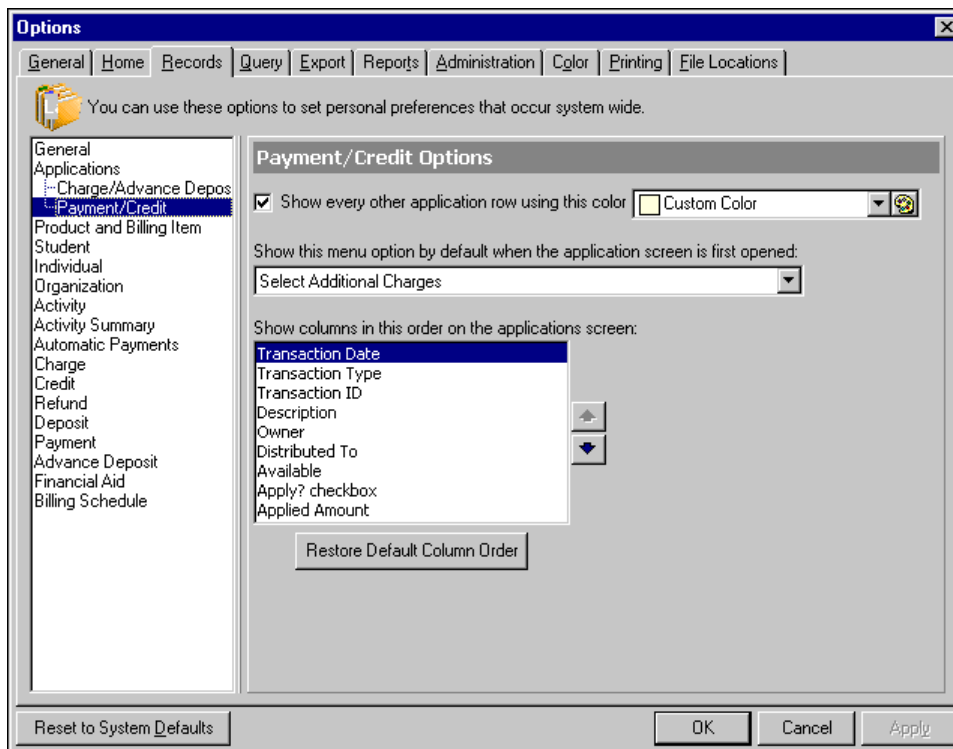
Show this menu option by default when the application screen is first opened. Select the menu option that you would like to appear on the application screen for charges and line items. Other options are available from the applications screen by clicking the down arrow next to your selection.

Show columns in this order on the applications screen. Select an item use the up and down arrow buttons to move column in the order you want them to appear on the applications screen.

Restore Default Column Order. Click this button to restore the column order to system defaults.

Payment/Credit

With the Payment/Credit Options, you select the appearance of the applications screen accessed through payments and credits.

Show every other application row using this color [ ]. Mark this box to alternate colors of rows on the application screen. Select a color from the submenu or click on the palette icon to define your own color.
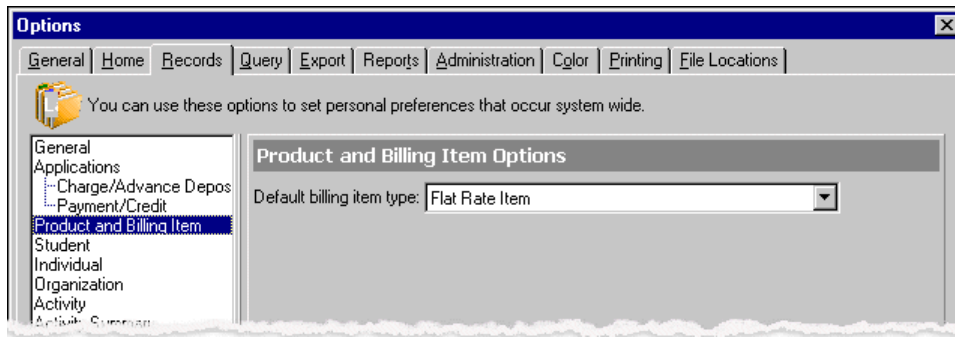
Show this menu option by default when the application screen is first opened. Select the menu option that you would like to appear on the application screen for payments and credits. Other options are available from the applications screen by clicking the down arrow next to your selection.

Show columns in this order on the applications screen. Select an item use the up and down arrow buttons to move column in the order you want them to appear on the applications screen.

Restore Default Column Order. Click this button to restore the column order to system defaults.
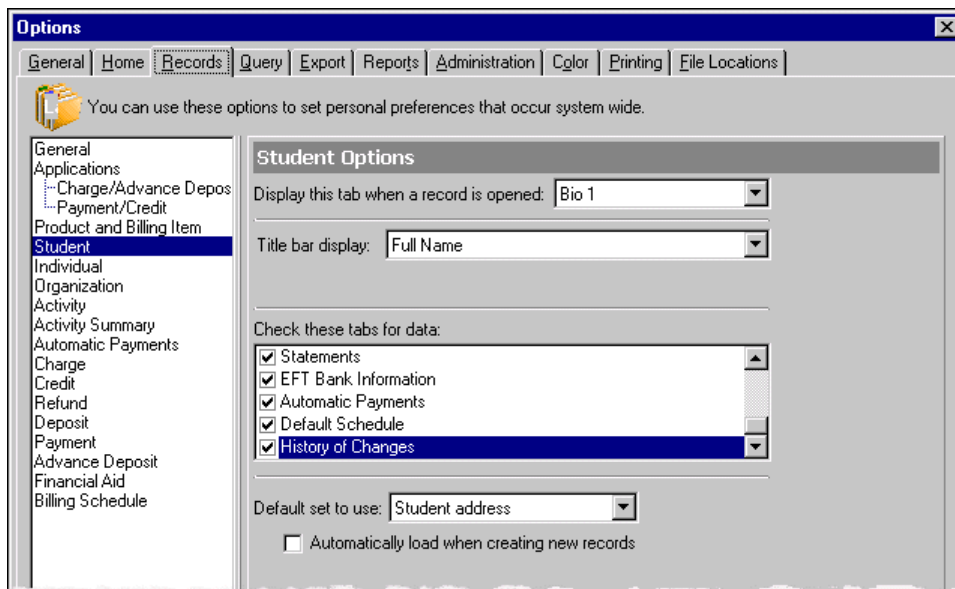
Product and Billing Item

For Product and Billing Item options on the Records tab, select the billing item type you add most frequently as the default. For example, select Flat Rate Item. On the Products and Billing Items page in *Records*, **New Flat Rate Item** appears on the action bar. You can click the down arrow beside **New Flat Rate Item** to access the new screens for the other types.

Student

For Student options on the Records tab, you can select the tab to display when a student record is opened, the tabs to check for data, the appearance of the name on the record, and default tab filters.

Display this tab when a record is opened. Select the tab to appear first when you open a student record.

Title bar display. Select the appearance of student names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.
- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.
- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Student Billing*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.
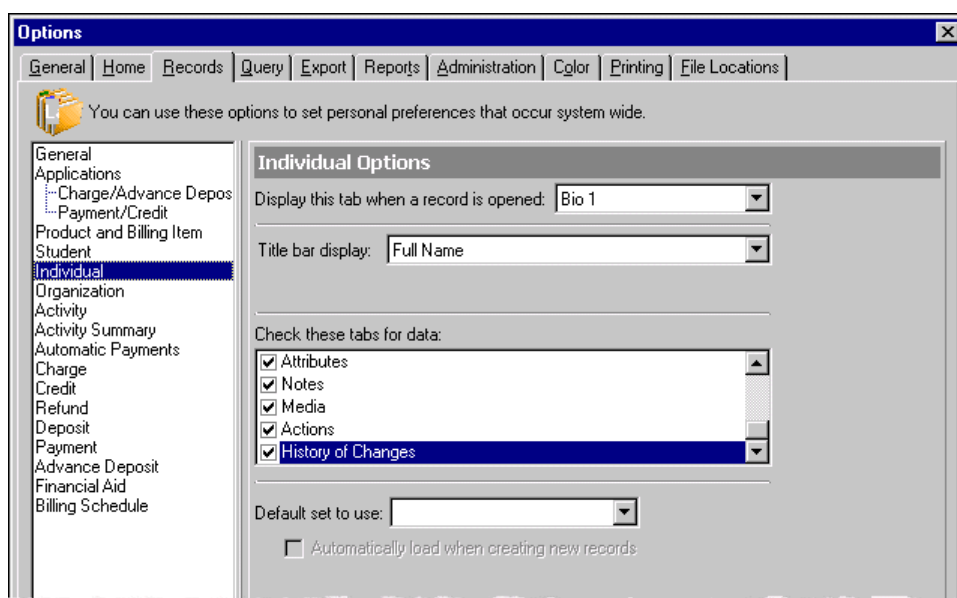
Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new student records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new student record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Individual

For Individual options on the Records tab, you can select the tab to display when an individual record is opened, the tabs to check for data, and the appearance of the name on the record.

Display this tab when a record is opened. Select the tab to appear first when you open an organization record.

Title bar display. Select the appearance of individual names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.

- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.

- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Student Billing*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.
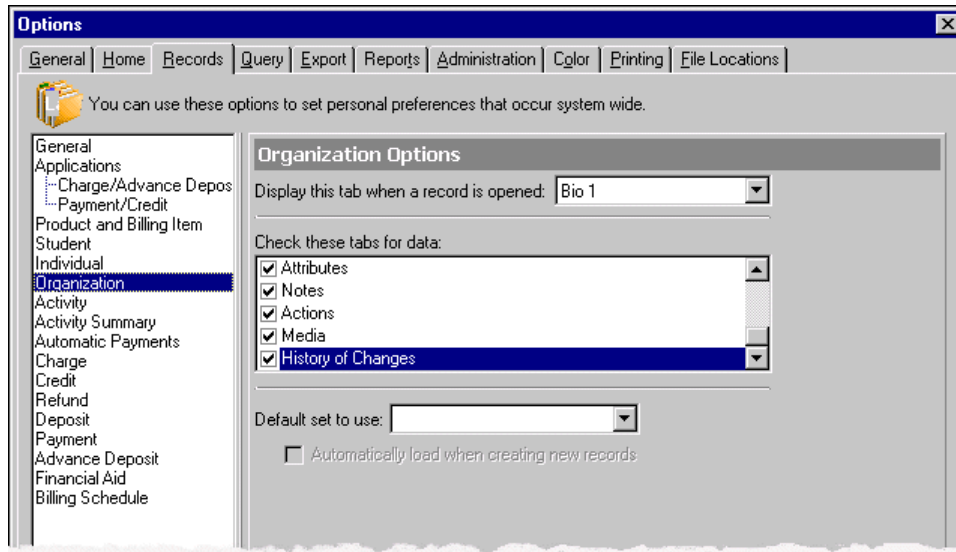
Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new individual records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new individual record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **Shift + F2** to load all the values from the default set.

Organization

For Organization options on the Records tab, you can select the tab to display when an organization record is opened and the tabs to check for data.

Display this tab when a record is opened. Select the tab to appear first when you open an organization record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new organization records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new organization record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **Shift + F2** to load all the values from the default set.

Activity

For Activity options on the Records tab, you can select to include deleted transactions and set display options for the Activity tab of student records.
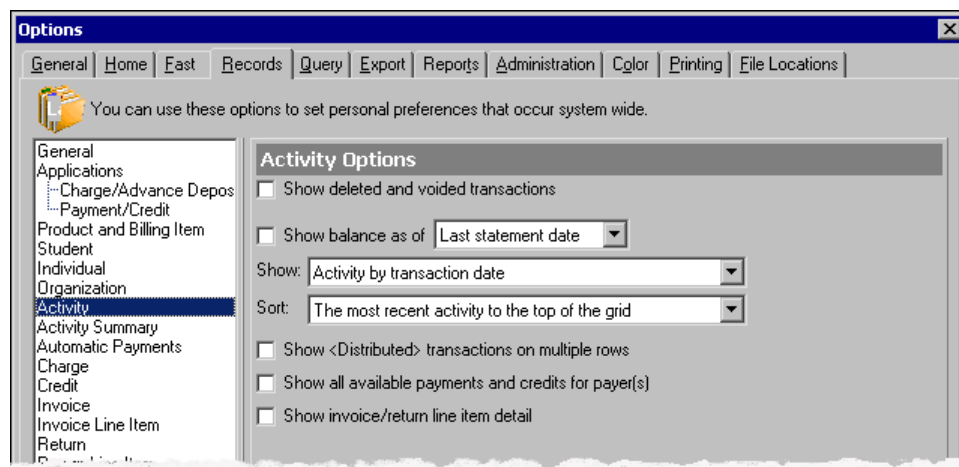
Show deleted and voided transactions. To view deleted and voided, posted transactions on the student Activity tab, mark the checkbox. You cannot view deleted transactions that were never posted.

Show balance as of. Select to show the balance on the Activity tab by last statement date, last calendar year, last fiscal year, last fiscal period, or the current date. This date is a default and can be changed on the Activity tab.

Show. Select to show activity by transaction date or to show payments/credits with their associated charges.

Sort. Select to show the most recent or the oldest activity at the top of the grid.

Show <Distributed> transactions on multiple rows. Mark this option to mark the **Show <Distributed> transactions on multiple rows** checkbox on students' Activity tab by default. Marking this option displays each line item of distributed transactions on a separate row in the grid. You can unmark the box on the Activity tab.

Show all available payments and credits for payer(s). Mark this option to mark Show all available payments and credits for payer(s) checkbox on students' Activity tab by default. Marking this option displays all payments and credits, including those for other payers. You can unmark the box on the Activity tab.

Show invoice/return line item detail. Mark this option to mark the **Show invoice/return line item detail** checkbox on students' Activity tab by default. Marking this option displays individual invoice line items and return line items as entries on the Activity tab. If you do not mark this option, the invoices and returns display as entries. You can unmark the box on the Activity tab.

Activity Summary

For Activity Summary options on the Records tab, set display options for viewing summary activity information. To view a student activity summary, from a student record, click **Summary** on the action bar of the student Activity tab.
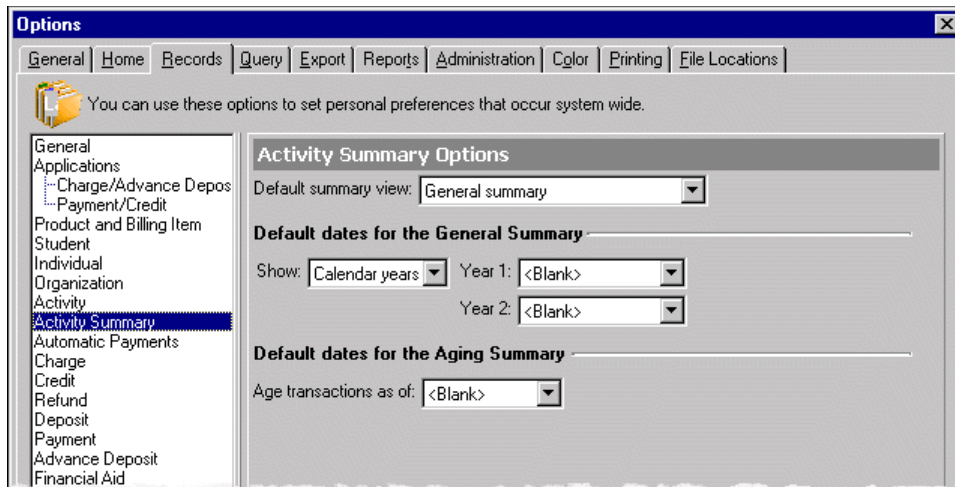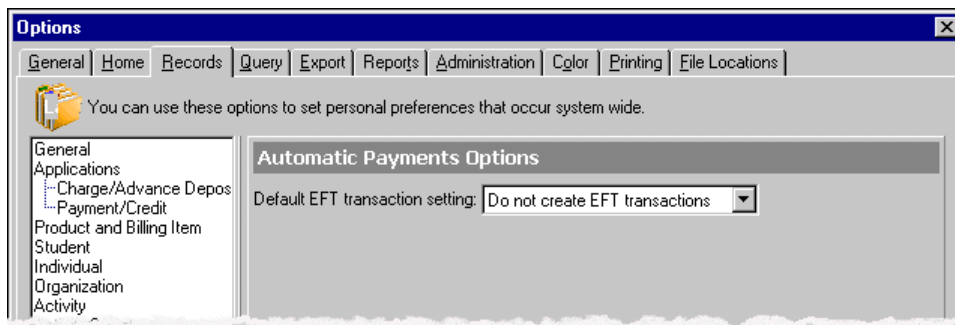

Default summary view. Select the default summary view: General summary, Recent activity, Aging summary, Lifetime statistics, or Fin. Aid/Adv. Deposit summary. You can change the view on the Summary screen.

Default dates for the General Summary. Select to show dates by calendar years, fiscal years, or fiscal periods. These are default dates, you can change this on the Summary screen.

Default dates for the Aging Summary. For the Aging Summary, you can select for the current or previous date to automatically default in the **Age transactions as of** field, or select <Blank> to require the date to be entered manually.

Automatic Payments

If you have the *EFT* optional module installed, for Automatic Payments options on the Records tab, you can select the default EFT transaction setting for the Automatic Payments tab of student, individual, and organization records.

Charge

For Charge options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a charge record: Transaction, GL Distribution, Payments/Credits, or Attributes/Notes.

Default charge date. For the transaction date of a new charge to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Transaction tab of each new charge.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, charge date, or the last date of the current fiscal period. To require the post date to be entered manually on each new charge record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the charge post date. To require the date to be entered manually when you delete a charge, select <Blank>.
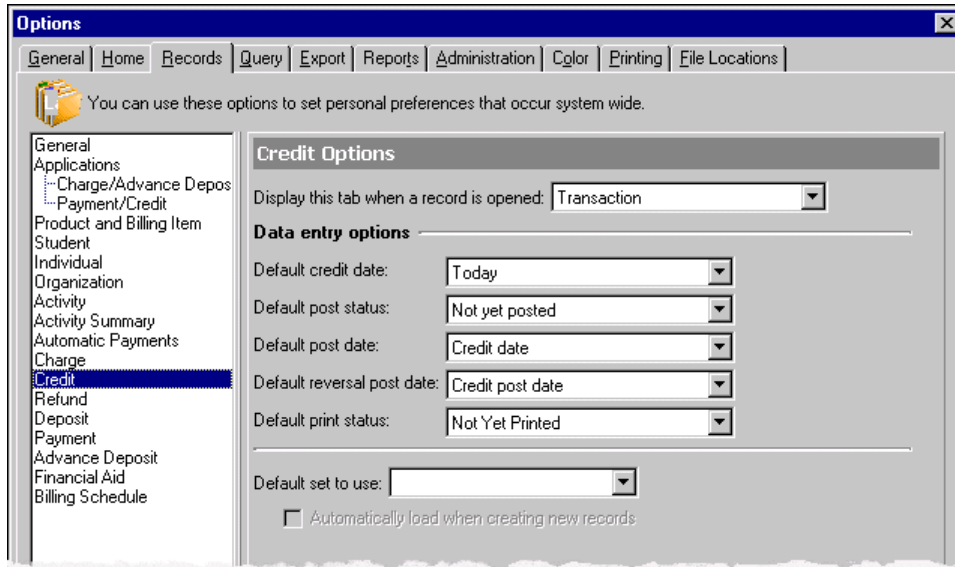
Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Default set to use [ ]. In this field, select a default set to use for new charge records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new charge record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Credit

For Credit options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a credit record: Transaction, GL Distribution, Applied To, or Attributes/Notes.

Default credit date. For the transaction date of a new credit to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Transaction tab of each new credit.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, credit date, or the last date of the current fiscal period. To require the post date to be entered manually on each new credit record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the credit post date. To require the date to be entered manually when you delete a credit, select <Blank>.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Default set to use [ ]. In this field, select a default set to use for new credit records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new credit record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Invoice

For Invoice options on the Records tab, you can select the default tab and set data entry defaults.
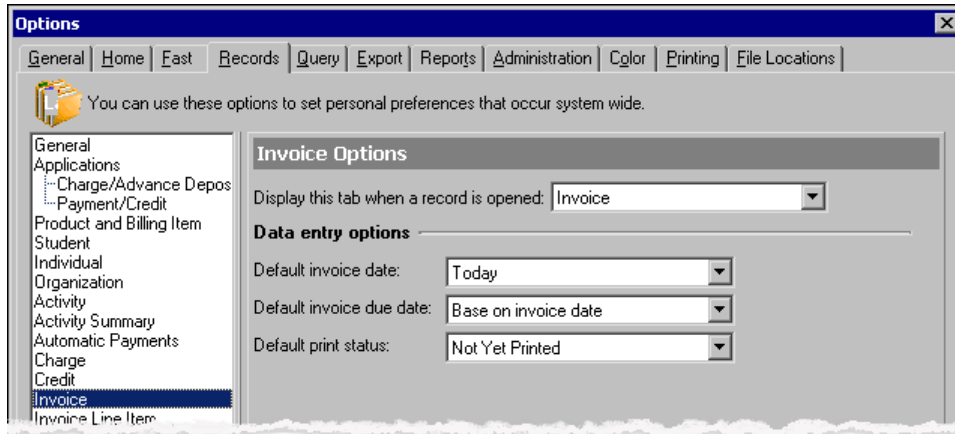
Display this tab when a record is opened. Select the tab to appear first when you open an invoice record: Invoice, Line Items, Payments/Credits, or Attributes/Notes.
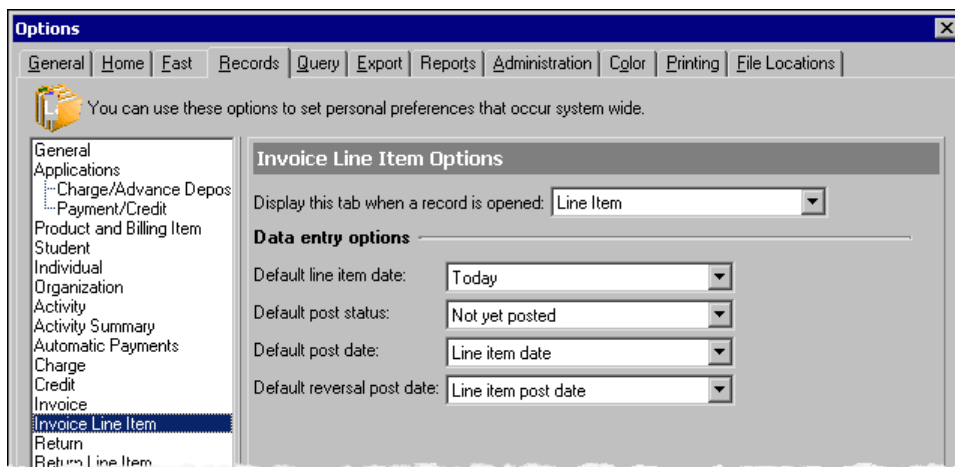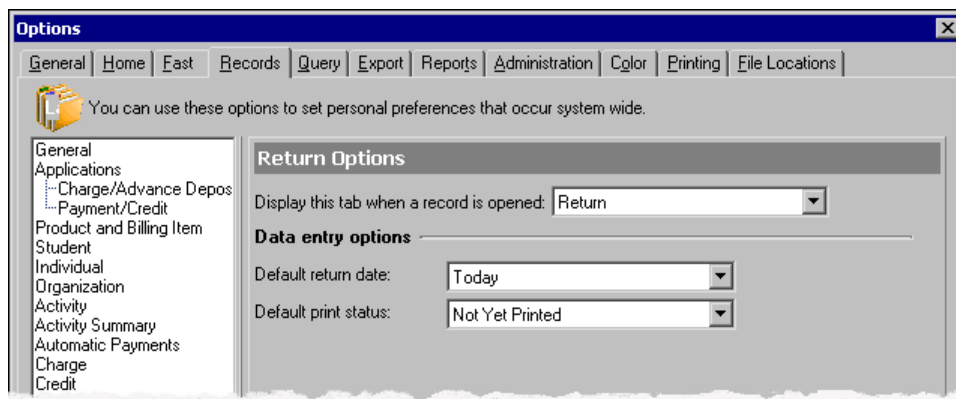
Default invoice date. For the invoice date of a new invoice to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Invoice tab of each new invoice.

Default invoice due date. Use this option to select the default invoice date. If you select Base on invoice date, the default due date is determined by the terms selected on the invoice. If you select <Blank>, the date must be entered on the Invoice tab of each new invoice.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Invoice Line Item

For Invoice Line Item options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open an invoice line item record: Line Item, GL Distribution, Payments/Credits, or Notes.

Default line item date. For the transaction date of a new invoice line item to automatically default to the current date, select Today. If you select <Blank>, the date must be entered on the Line Item tab of each new line item.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.
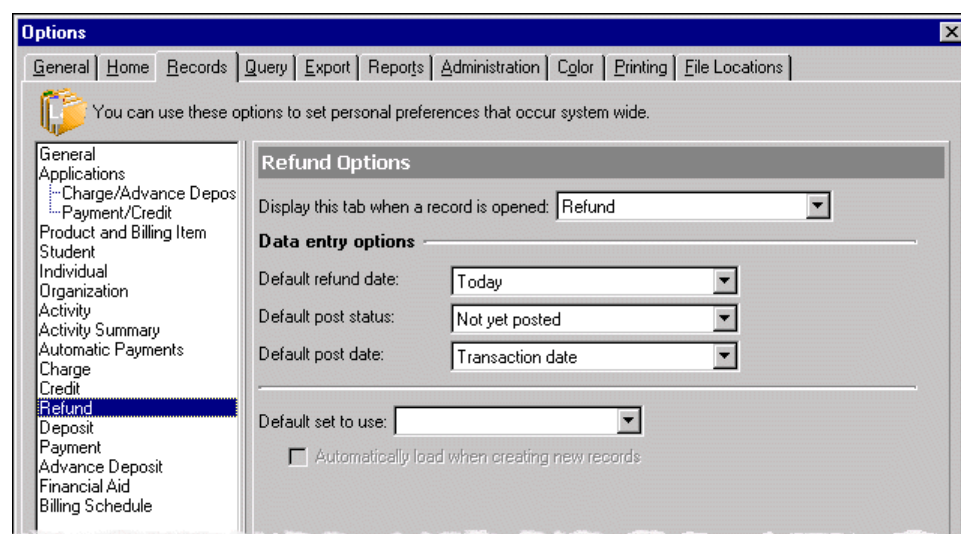
Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, line item date, or the last date of the current fiscal period. To require the post date to be entered manually on each new invoice line item record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the line item post date. To require the date to be entered manually when you delete an invoice line item, select <Blank>.

Return

For Return options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a return record: Return, Line Items, or Attributes/Notes.

Default return date. For the return date to default to the current date, select Today. If you select <Blank>, the date must be entered on the Return tab of each new return.

Default print status. You can set the default print status to Do Not Print or Not Yet Printed.

Return Line Item

For Return Line Item options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a return line item record: Line Item, GL Distribution, Applied To, or Attributes/Notes.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

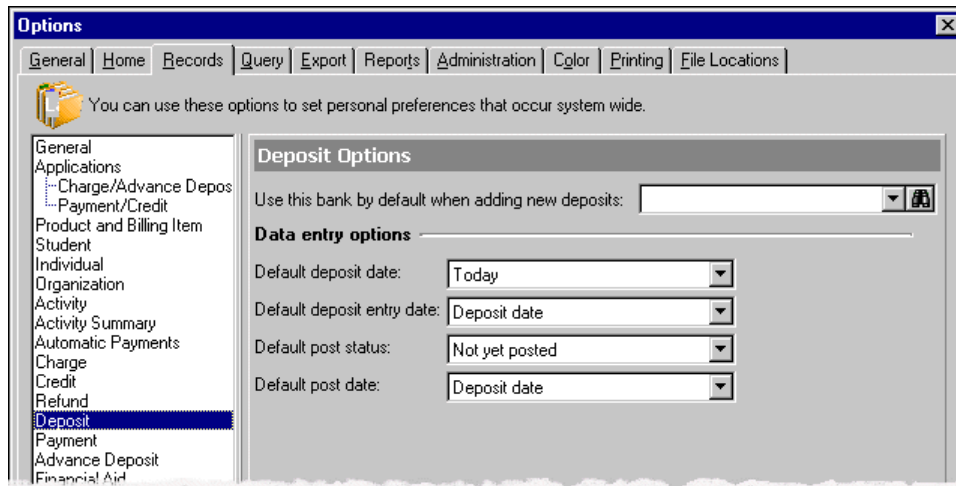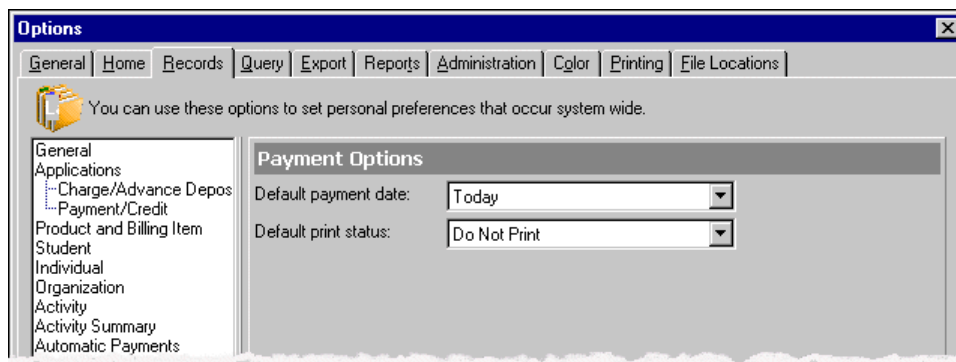**Default post status.** You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, line item date, or the last date of the current fiscal period. To require the post date to be entered manually on each new return line item record, select <Blank>.

Default reversal post date. You can set the default reversal post date to the current date or the line item post date. To require the date to be entered manually when you delete a return line item, select <Blank>.

Refund

For Refund options on the Records tab, you can select the default tab and set data entry defaults.

Display this tab when a record is opened. Select the tab to appear first when you open a refund record: Refund, GL Distribution, Payments/Credits, or Attributes/Notes.

Default refund date. For the refund date to default to the current date, select Today. If you select <Blank>, the date must be entered on the Refund tab of each new refund.

Note: If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, transaction date, or the last date of the current fiscal period. To require the post date to be entered manually on each new refund record, select <Blank>.

Default set to use [ ]. In this field, select a default set to use for new refund records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new refund record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Deposit

For Deposit options on the Records tab, you can select a default bank and set data entry defaults.

Use this bank by default when adding new deposits. Select the bank you use most frequently for new deposits.

Default deposit date. For the deposit date to default to the current date, select Today. If you select <Blank>, the date must be entered manually.

Default deposit entry date. You can set the default deposit entry date to the current date or the deposit date. If you select <Blank>, the date must be entered manually.

> **Note:** If a business rule is set to exclude Do not post, the only available post status is Not yet posted.

Default post status. You can set the default post status to Not yet posted or Do not post.

Default post date. You can set the default post date to the current date, deposit date, or the last date of the current fiscal period. To require the post date to be entered manually on each new deposit record, select <Blank>.

Payment

For Payment options on the Records tab, you can set the default values for payment records.

Default payment date. Select the default payment date for new payments. If you select <Blank>, the date must be entered manually.

Default print status. Select the default print status for new payments.

Advance Deposit

For Advance Deposit options on the Records tab, you can select the tab to display when an advance deposit record is opened and the default transaction date to use for advance deposit transactions.
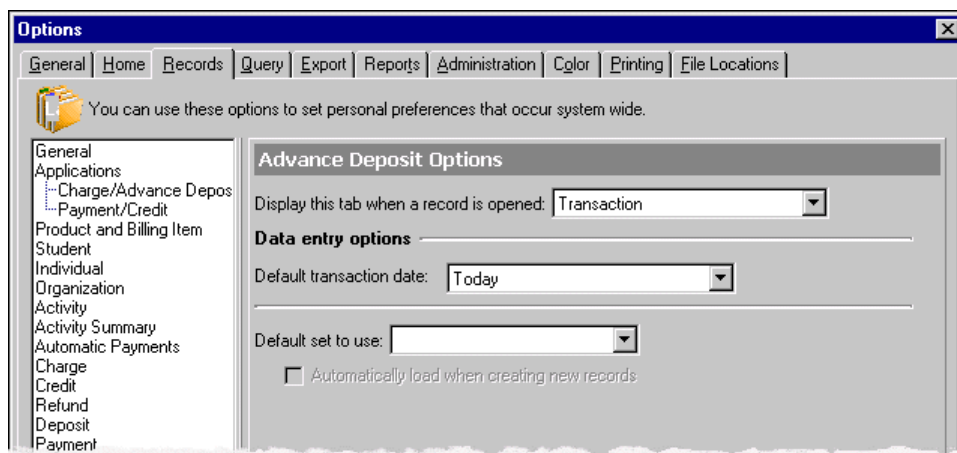
Display this tab when a record is opened. Select the tab to appear first when you open an advance deposit record: Transaction, GL Distribution, Payments/Credits, Apply To, Attributes/Notes, or Schedule.

Default transaction date. You can select to set the default to today's date or select <Blank> so the date must be entered on the General tab of each new transaction.

Default set to use [ ]. In this field, select a default set to use for new advance deposit records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new advance deposit record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Financial Aid

For Financial Aid options on the Records tab, you can select the tab to display when a financial aid record is opened and the default transaction date to use for financial aid transactions.
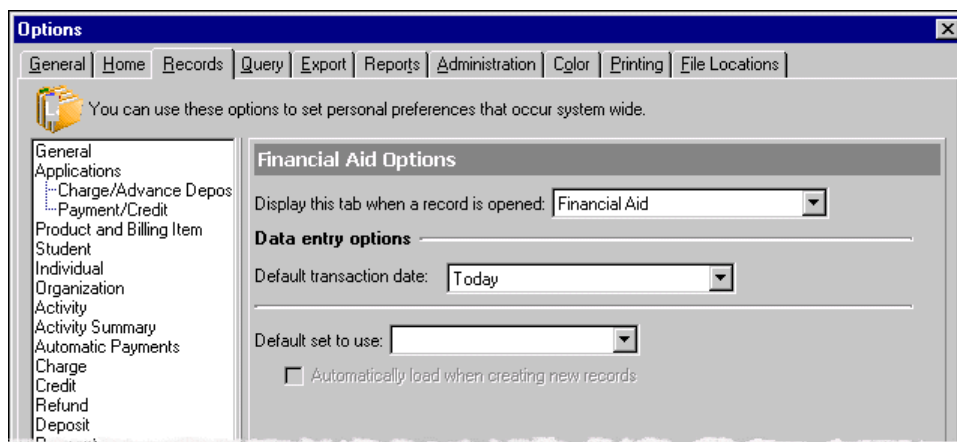
Display this tab when a record is opened. Select the tab to appear first when you open a financial aid record: Financial Aid, GL Distribution, Payments/Credits, Apply To, Attributes/Notes, or Schedule.

Default transaction date. You can select to set the default to today's date or select <Blank> so the date must be entered on the General tab of each new transaction.

Default set to use [ ]. In this field, select a default set to use for new financial aid records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new financial aid record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Billing Schedule

For Billing Schedule options on the Records tab, you can select the tab to display when a billing schedule is opened and the default transaction date to use for billing schedules.
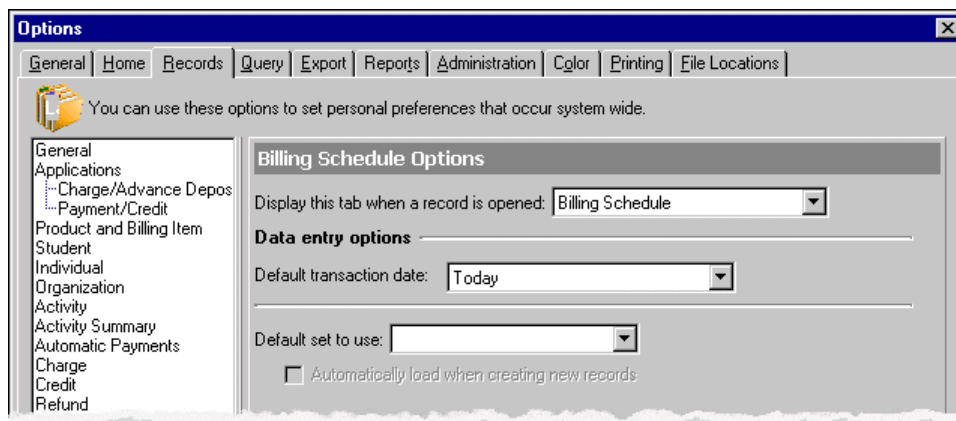
Display this tab when a record is opened. Select the tab to appear first when you open a billing schedule: Billing Schedule, GL Distribution, Payers, Schedule, or Attributes/Notes.

Default transaction date. You can select to set the default to today's date or select <Blank> so the date must be entered on the General tab of each new transaction.

Default set to use [ ]. In this field, select a default set to use for new billing schedule records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new billing schedule record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Address

For Address options on the Records tab, you can select the default address type to use.
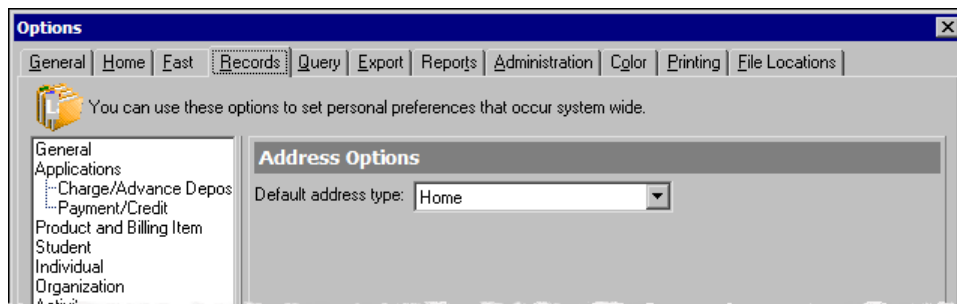
Default address type. Select the address type to use by default for records.

Admissions Office Records Options

The settings you define on the Records tab of the Options screen in **Admissions Office** affect applicants, faculty/staff, individuals, organizations, rooms, and academic years. For example, you can designate how names appear on records and the first tab that appears when a record is opened.

Applicant

For Applicant options on the Records tab, you can select the tab to display when an applicant record is opened, the tabs to check for data, and the appearance of the name on the record.
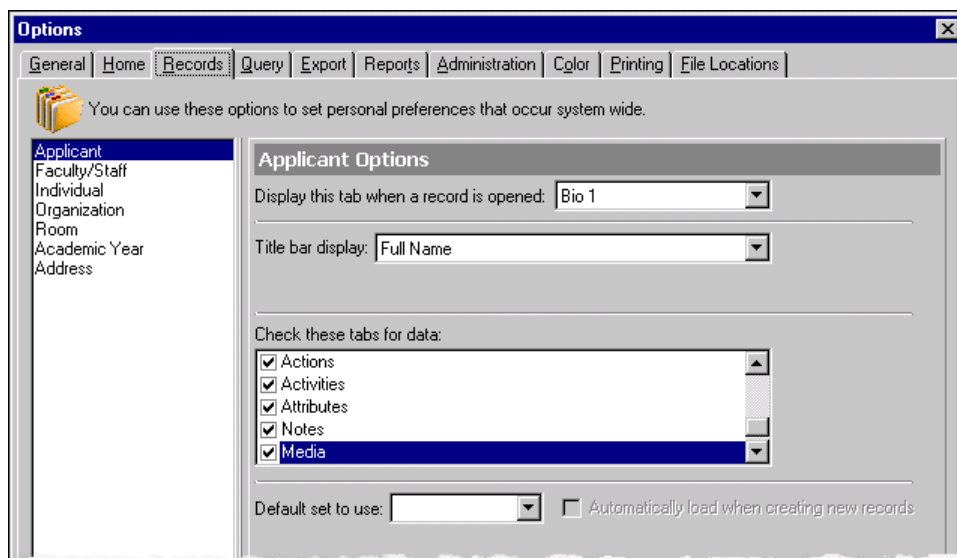
Display this tab when a record is opened. Select the tab to appear first when you open an applicant record.

Title bar display. Select the appearance of applicant names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.

- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.

- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Admissions Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.
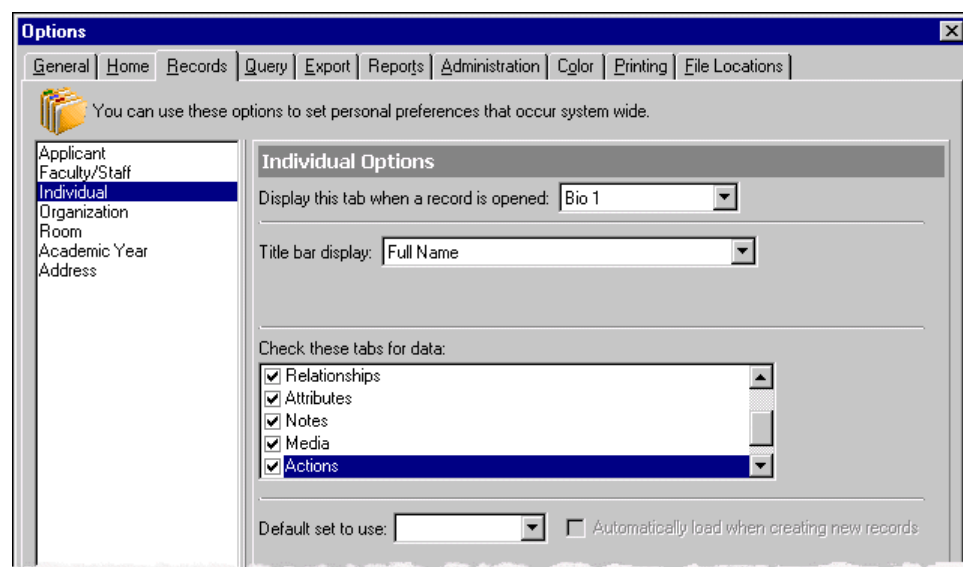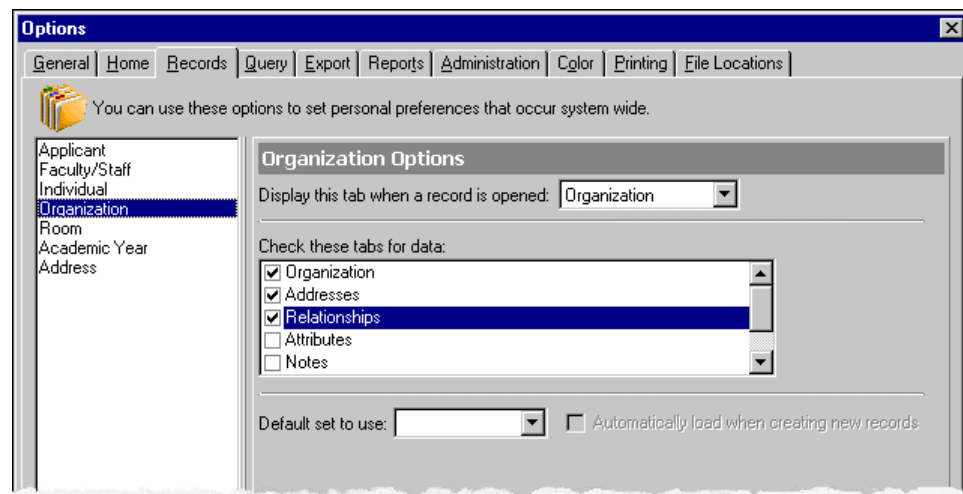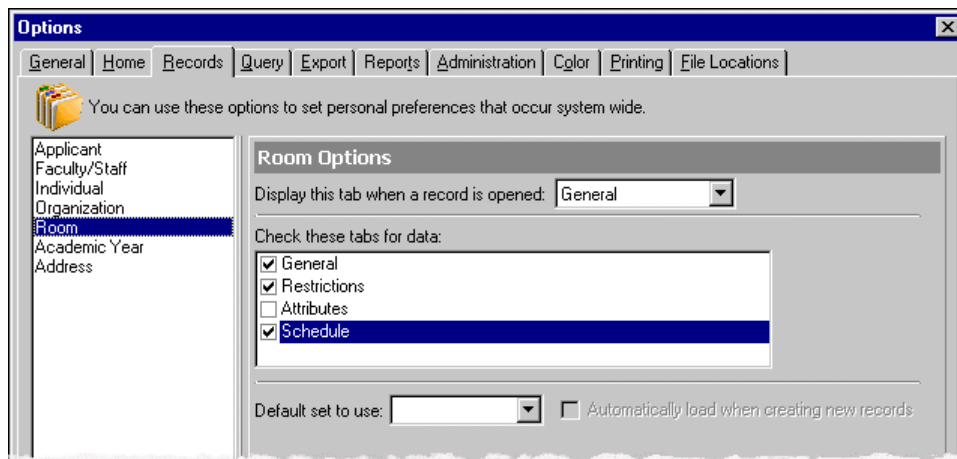
Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new applicant records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new applicant record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Faculty/Staff

For Faculty/Staff options on the Records tab, you can select the tab to display when a faculty/staff record is opened, the tabs to check for data, and the appearance of the name on the record.

Display this tab when a record is opened. Select the tab to appear first when you open a faculty/staff record.

Warn if attempting to assign an advisor to a student already assigned to an advisor. Mark this checkbox to receive a warning if you attempt to assign an advisor to a student who already has one. When the message appears, you can replace the current advisor or cancel adding the student. If you do not mark this box, the current advisor is replaced without a warning message.

Title bar display. Select the appearance of faculty/staff names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.

- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.

- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Admissions Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new faculty/staff records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new faculty/staff record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Individual

For Individual options on the Records tab, you can select the tab to display when an individual record is opened, the tabs to check for data, and the appearance of the name on the record.

Display this tab when a record is opened. Select the tab to appear first when you open an individual record.

Title bar display. Select the appearance of individual names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.

- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.

- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in Configuration. For more information, see the *Configuration Guide for Admissions Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. You can mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new individual records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new individual record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Organization

For Organization options on the Records tab, you can select the tab to display when an organization record is opened and the tabs to check for data.

Display this tab when a record is opened. Select the tab to appear first when you open an organization record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new organization records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new organization record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Room

For Room options on the Records tab, you can select the tab to display when a room record is opened and the tabs to check for data.

Display this tab when a record is opened. Select the tab to appear first when you open a room record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.
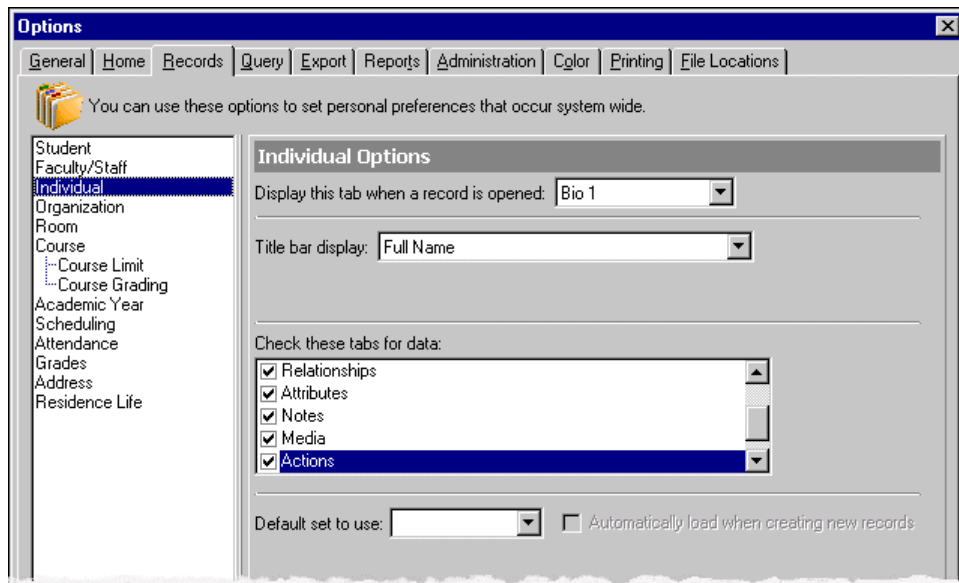
Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new room records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new room record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Academic Year

For Academic Year options on the Records tab, you can select the number of past and future academic years to appear in lists.
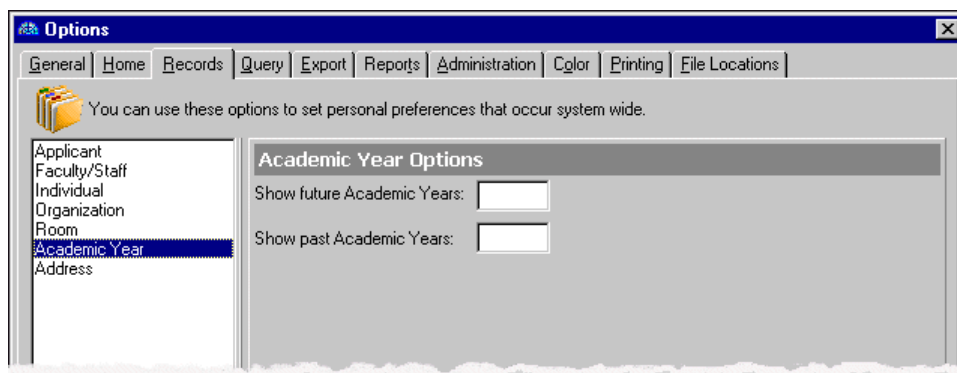
Show future Academic Years. Specify the number of future academic years to show in lists. The current academic year always appears.

Show past Academic Years. Specify the number of past academic years to show in lists. The current academic year always appears.

Address

For Address options on the Records tab, you can select the default address type to use.
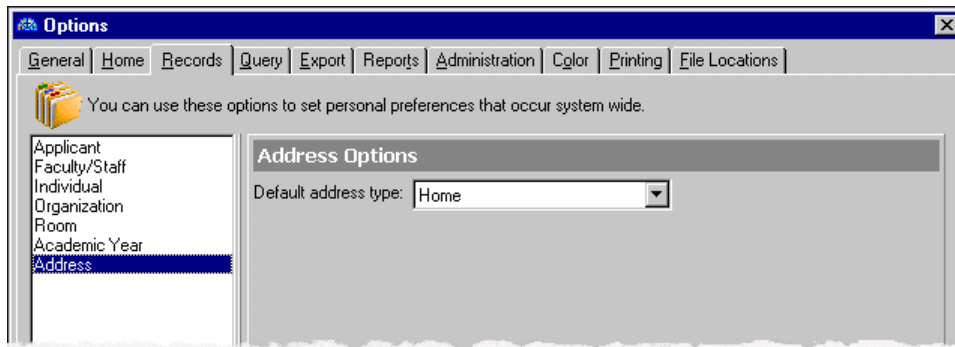
Default address type. Select the address type to use by default for records.

Registrar's Office Records Options

The settings you define on the Records tab of the Options screen in **_Registrar's Office_** affect students, faculty/staff, individuals, organizations, courses, rooms, academic years, grades, attendance, and scheduling. For example, you can designate how names appear on records and the first tab to appear when a record is opened.

Student

For Student options on the Records tab, you can select the tab to display when a student record is opened, the tabs to check for data, the appearance of the name on the record, and default tab filters.

Display this tab when a record is opened. Select the tab to appear first when you open a student record.

Title bar display. Select the appearance of student names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.
- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.
- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Registrar's Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.
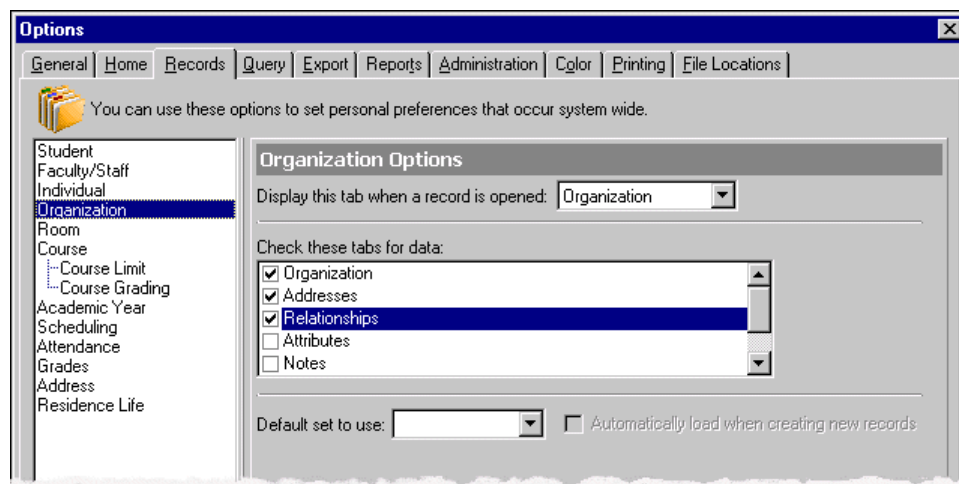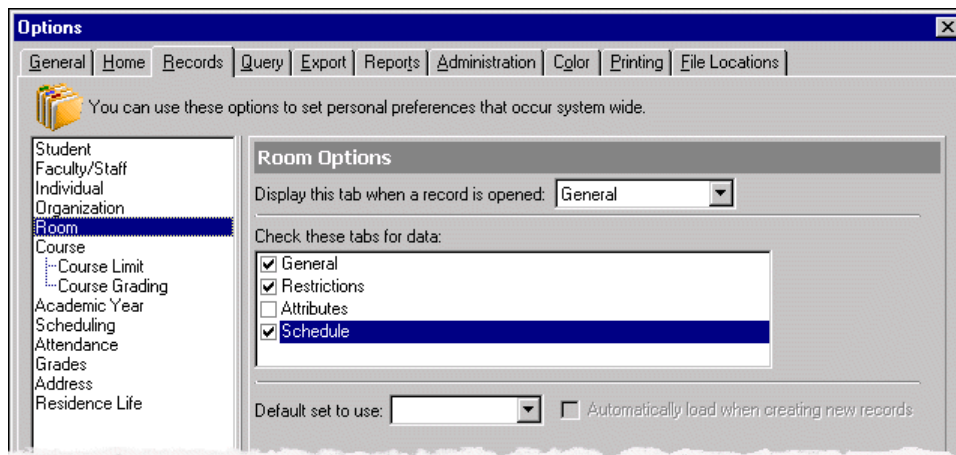
Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default tab filters. Select the default filters for the Activities, Conduct, Courses, Schedule, Grades, and Attendance tabs on student records. You can change the filters at any time when viewing the student record.

Default grades view. Select the grades view that appears when you select the Grades tab on a student record.

Default set to use [ ]. In this field, select a default set to use for new student records.

> If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new student record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Faculty/Staff

For Faculty/Staff options on the Records tab, you can select the tab to display when a faculty/staff records is opened, the tabs to check for data, and the appearance of the name on the record.

Display this tab when a record is opened. Select the tab to appear first when you open a faculty/staff record.

Warn if attempting to assign an advisor to a student already assigned to an advisor. Mark this checkbox to receive a warning if you attempt to assign an advisor to a student who already has one. When the message appears, you can replace the current advisor or cancel adding the student. If you do not mark this box, the current advisor is replaced without a warning message.

Title bar display. Select the appearance of faculty/staff names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.

- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.

- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Registrar's Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new faculty/staff records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new faculty/staff record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Individual

For Individual options on the Records tab, you can select the tab to display when an individual record is opened, the tabs to check for data, and the appearance of the name on the record.

Display this tab when a record is opened. Select the tab to appear first when you open an organization record.

Title bar display. Select the appearance of individual names on the title bar of records and in the Recently Accessed Records list.

- If you select Full Name, the title bar displays the name as defined on the record.
- If you select From Record, select Primary Addressee or Primary Salutation as the field to use.
- If you select From Addressee Table, select the addressee/salutation to use. Addressee/Salutations are defined in *Configuration*. For more information, see the *Configuration Guide for Registrar's Office*.

Note: If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new individual records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new individual record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Organization

For Organization options on the Records tab, you can select the tab to display when an organization record is opened and the tabs to check for data.

Display this tab when a record is opened. Select the tab to appear first when you open an organization record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new organization records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new organization record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Room

For Room options on the Records tab, you can select the tab to display when a room record is opened and the tabs to check for data.

Display this tab when a record is opened. Select the tab to appear first when you open a room record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Default set to use [ ]. In this field, select a default set to use for new room records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new room record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Course

For Course options on the Records tab, you can select the tab to display when a course record is opened, the tabs to check for data, the appearance of the name on the record, and default tab filters.

Display this tab when a record is opened. Select the tab to appear first when you open a course record.

> **Note:** If you mark options in the **Check these tabs for data** box, opening a record is noticeably slower.

Check these tabs for data. Mark the checkboxes for the tabs you want checked for data. If data is present, the name of the tab is colored based on your selection on the Color tab in Options. For more information about color options, see "Color Options" on page 146.

Title bar display. Select the appearance of the items in the title bar and Recently Accessed Records lists. In the **Field Name** column, select the field from the course record and in the **Length** column, enter the number of characters for the field.

Default tab filters. Select the academic year to filter for the Students and Classes tabs. You can change the filter at any time when viewing the tab.

Default set to use [ ]. In this field, select a default set to use for new course records.

If you mark **Automatically load when creating new records**, the default values are added automatically when you open a new course record. If you do not mark **Automatically load when creating new records**, you can place the cursor in a field and press **F2** to load a single default value from the set. Or you can press **SHIFT + F2** to load all the values from the default set.

Course Limit

For Course Limit options on the Records tab, you can assign default class size and classes per term.
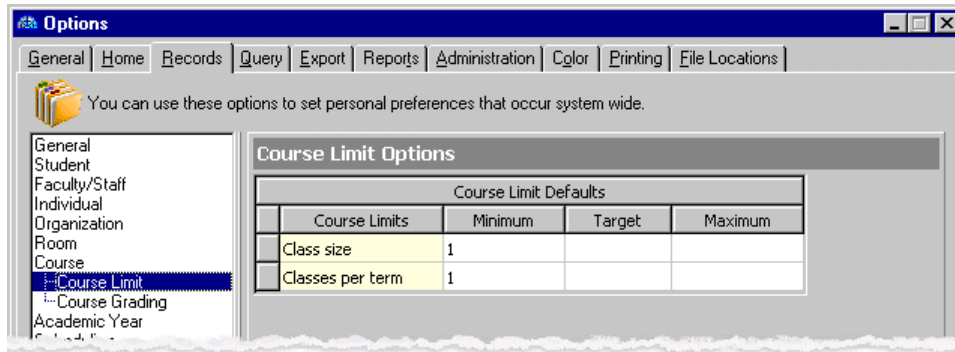
Course Limit Defaults. Enter the defaults for minimum, target, and maximum class size and classes per term. The defaults appear in the **Course Limits** grid on the Restrictions 1 tab of course records.

Course Grading

For Course Grading options on the Records tab, you can select the default translation table for course grading information.

Default translation table. Select the default translation table to appear in the **Translation Table** column on the Grading tab of course records.

Academic Year

For Academic Year options on the Records tab, you can select the number of past and future academic years to appear in lists.
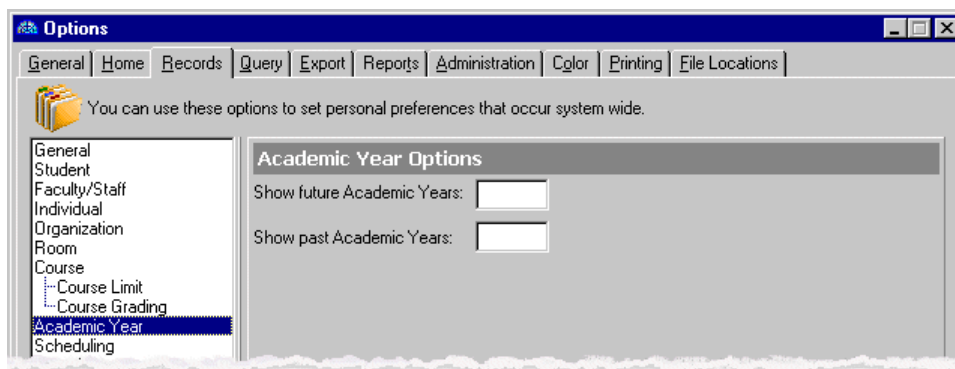
Show future Academic Years. Specify the number of future academic years to show in lists. The current academic year always appears.

Show past Academic Years. Specify the number of past academic years to show in lists. The current academic year always appears.

Scheduling

For Scheduling options on the Records tab, you can select to receive a prompt when changing views and deleting enrollments. You can also define how you want to display courses and cycle days.

Prompt to save when changing views. Mark this checkbox to receive a message prompting you to save \ changes when switching views. If unmarked, the program automatically saves any changes when switching views.

Prompt to delete requests when deleting enrollment. Mark this checkbox to receive a message confirming that you want to delete requests when you delete an enrollment. If you do not mark the checkbox, you cannot delete requests when deleting enrollment.

Display cycle day using [ ]. Select to display cycle days as Display Code or Day throughout the scheduling process.

Display course using [ ]. Select to display courses by Course ID or Course Name throughout the scheduling process.

Display class using [ ]. Select to display classes by Course ID or Course Name throughout the scheduling process.

When viewing course requests. Mark the checkboxes for the columns you do not want to appear when you view course requests.

Attendance

For Attendance options on the Records tab, you can select the default attendance entry dates.
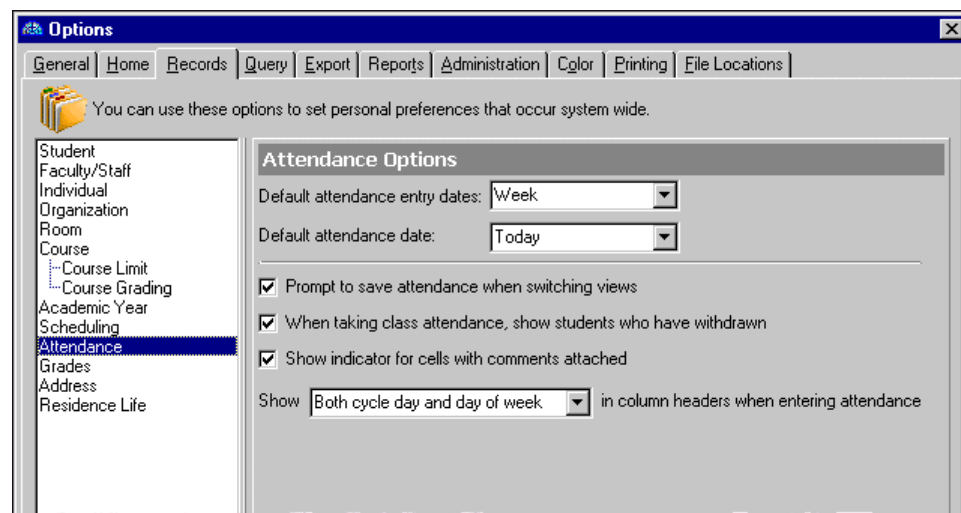
Default attendance entry dates. Select default attendance entry dates of "Week", "Day", or "Month" to appear when entering attendance. For example, if you enter attendance for the entire week on Fridays, you can select "Week" to have the current week appear in the grid.

Default attendance date. Select the day to display when entering attendance.

Prompt to save attendance when switching views. Mark this checkbox to receive a message prompting you to save attendance when switching views. If unmarked, attendance is saved automatically when switching views.

When taking class attendance, show students who have withdrawn. You can select to show withdrawn students when taking attendance.

Show indicator for cells with comments attached. Mark this checkbox to view a comment indicator for any attendance entry with an assigned comment. The indicator is a red triangle in the upper right corner of the cell.

Show [ ] in column headers when entering attendance. Select the column headers to appear when entering attendance. You can select "Both cycle day and day of week", "Cycle day", or "Day of week".

Grades

For Grades options on the Records tab, you can select the columns appearing on the grades entry screen, the appearance of student and teacher names, and to receive a prompt when switching views.

Show these columns. Specify columns that appear by default when accessing **Enter Grades by Teacher**, **Enter Grades by Course**, or **Enter Grades by Student**. For each of these areas, you can choose from these options:

- Grade columns only — only the **Grade** column appears.

- Comment columns only — only the **Comment** column appears.

- Grade and Comment columns — both the **Grade** and **Comment** columns appear.

- Grade and Credit columns — the **Grade**, **Credits Attempted**, and **Credits Earned** columns appear.

- All columns — the **Grade**, **Attempted Credits**, **Awarded Credits**, **Use in Calculations**, **Print Grade on Transcripts**, **Print Grade on Report Cards**, **Comment**, **Print Comment on Transcripts**, and **Print Comment on Report Cards** columns appear.

Student Addressee/Salutation. Select the addressee/salutation to use for students' names on screens and grids.

Teacher Addressee/Salutation. Select the addressee/salutation to use for teachers' names on screens and grids.

Display course using. Select whether to display the course name or course ID in the **Course** column of the grid.

Prompt to save grades when switching views. Mark this checkbox to receive a message prompting you to save changes when you switch views. If unmarked, the program automatically saves any changes when switching views.

Address

For Address options on the Records tab, you can select the default address type to use.
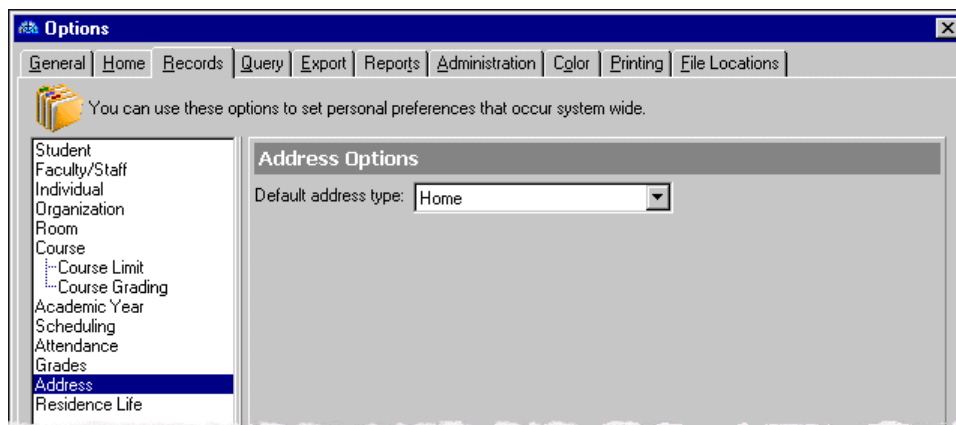
Default address type. Select the address type to use by default for records.

Residence Life

If you have the optional module *Residence Life*, you can set Residence Life options on the Records tab. You can select the tab to display when a residence hall is opened, the default meal plan, and to receive a prompt when switching views.
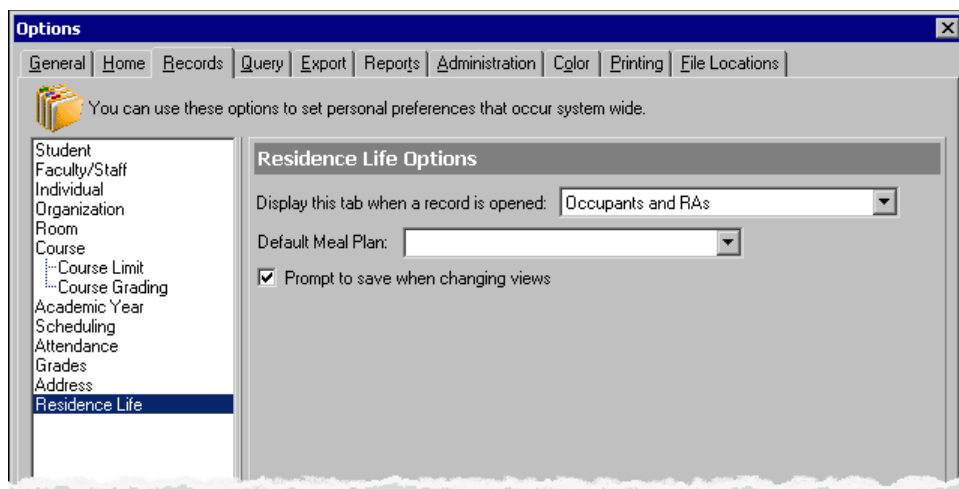
Display this tab when a record is opened. Select the tab to appear first when you open a residence life record.

Default Meal Plan. Select the meal plan to use by default for residence life records.

Prompt to save when changing views. Mark this checkbox to receive a message prompting you to save changes when switching views. If unmarked, the program automatically saves any changes when switching views.

Query Options

On the Query tab, you can define general, advanced, and code table preferences for queries you create. General query options include several default settings, such as which tab appears first when you open a query and which query format to use. For Advanced query options, you can specify how you want Yes/No fields to appear, whether to automatically add criteria and sort fields as output fields, and how you want to apply filter criteria to summary fields. For Code Table options, you specify how you want to display and sort table entries.

General Query

For General options on the Query tab, you can set defaults to save you time during data entry.
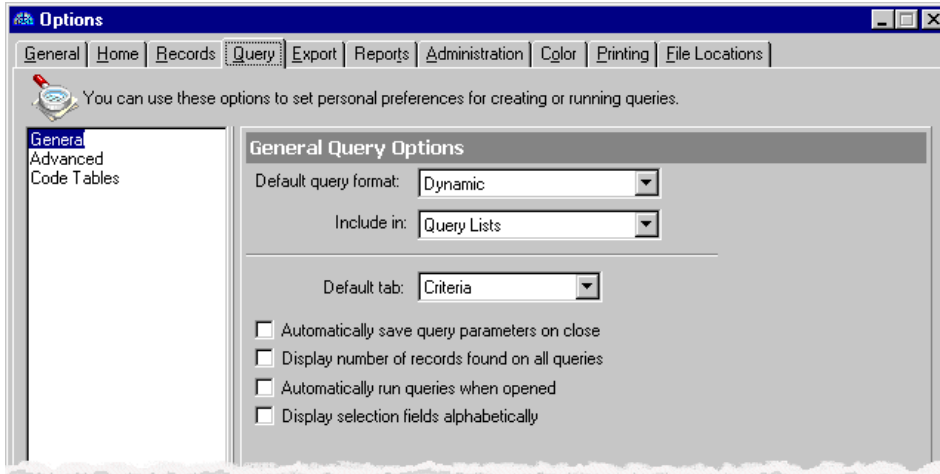
Tip: Default settings appear automatically when you create a new query. This feature can save you time, particularly if you create queries primarily using either the dynamic or static format.

Default query format. Select Dynamic or Static, depending on which query format you create most often. You can manually change this setting when you create a query.

Include in. This setting defaults to Query Lists.

Default tab. Specify the tab that appears first when you open a query record: Criteria, Output, Sort, or Results.

Automatically save query parameters on close. To automatically save the query when you close it without the program asking you, mark the checkbox. Be aware that if you make changes that you do not want saved, you must click **Cancel** to close the query or your changes will be saved automatically.

Display number of records found on all queries. To view the number of records found in each query in the **Records** column on the Query page, mark the checkbox.

Automatically run queries when opened. To automatically run a query when you open it, mark the checkbox. This saves a step if you routinely open dynamic queries in order to run them and view the latest results.

Display selection fields alphabetically. To display the field selections under each field type on the Criteria, Sort, and Output tabs of a query in alphabetical order, mark the checkbox. Otherwise, fields are listed in the order they appear on the field type records.

For example, the first four field selections for the **Account** field type normally are listed as **Account**, **Description**, **Category**, **Class**. When alphabetized, the first four field selections for **Account** are **Account**, **Active/inactive**, **Cash flow**, and **Category**.

Advanced Query

For Advanced options on the Query tab, you set options that affect the query output.
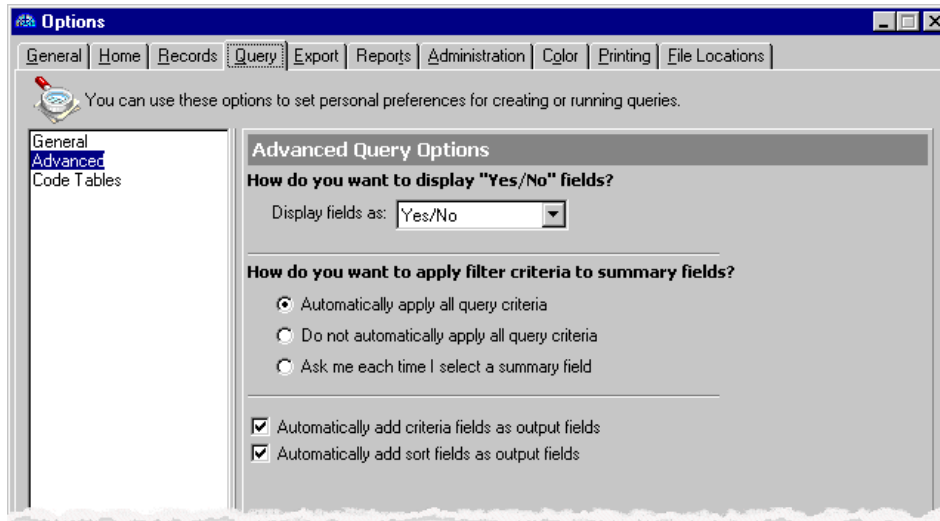
How do you want to display "Yes/No" fields? When a value equals Yes/No, you can select this value to be displayed as True/False, True/(Blank), T/F, Yes/No, Yes/(Blank), or Y/N.

For example, on a Vendor query, the **1099 Vendor** field selection equals a Yes/No value.

How do you want to apply filter criteria to summary fields? When you select a **Summary** field, you can have the program ask you each time if you want to apply applicable criteria to the summary field. If you are sure you never want to apply existing field criteria, mark **Do not automatically apply all query criteria**. If you always want to apply existing field criteria, mark **Automatically apply all query criteria**.

Note: If you normally select most of the criteria fields as output or sort fields, marking these checkboxes can save you time. On the Output and Sort tabs, you can still individually remove any fields you do not want.

Automatically add criteria fields as output fields. If you want all fields selected on the Criteria tab to automatically be added as output fields on query results, mark the checkbox.

Automatically add sort fields as output fields. If you want all fields selected on the Sort tab to automatically added as output fields on query results, mark the checkbox.

Code Table

For Code Tables options on the Query tab, you can determine how you want the program to sort and display table entries that have been coded into the program.
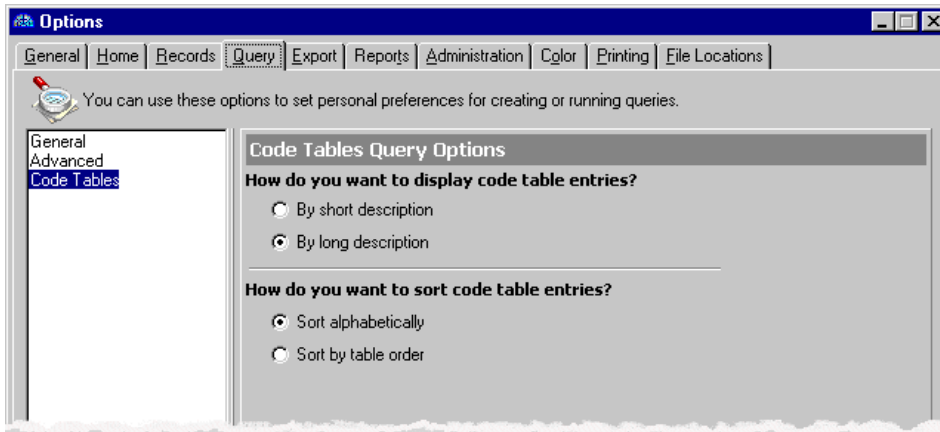
How do you want to display code table entries? You can select to display code table entries by short or long description on query results.

How do you want to sort code table entries? You can select to sort table entries alphabetically or by the table order set up in *Configuration*.

Export Options

On the Export tab, you can set a default export format, select to automatically save an export when closing it, and select the format to export yes/no fields. These options apply only to files created in *Export*, not to exports created elsewhere in the program.
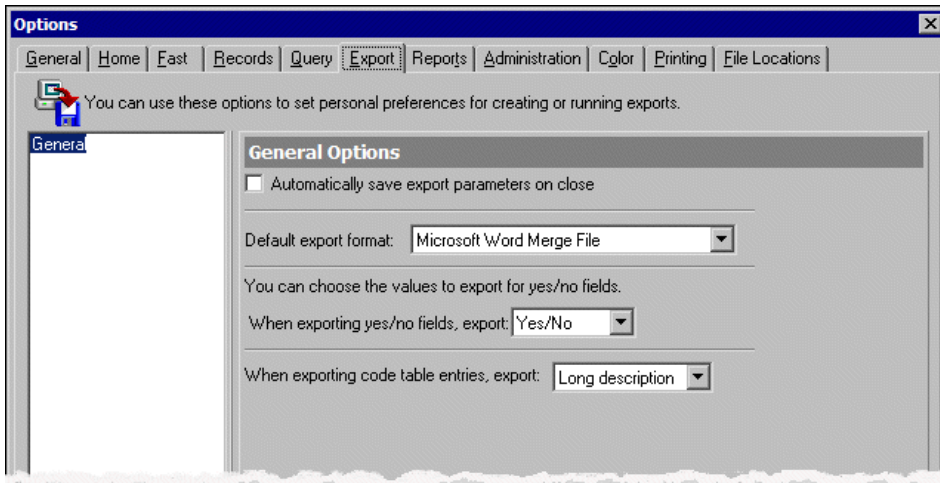
Automatically save export parameters on close. To automatically save the export when you close it without the program asking you, mark the checkbox. Be aware that if you make changes that you do not want saved, you must click **Cancel** to close the export or your changes will be saved automatically.

Default export format. Select the export format you use most frequently.

When exporting yes/no fields, export [ ]. When a value equals Yes/No, you can select this value to be displayed as True/False, True/(Blank), T/F, Yes/No, Yes/(Blank), or Y/N.

When exporting code table entries, export [ ]. With this option you can set the default format for how code table entries are exported. Your choices are "Long description" or "Short description". Keep in mind, this is the default; you can change the setting when a code table entry is selected for export. You can choose either the short or long description on a per-export basis on the Description Format screen.

Setting this user option affects what is exported from all code tables with short and long descriptions, except those that currently have both options available as separate fields in export.

Reports Options

For Reports options, you can select a default print setup, set the program to automatically save a report parameter file when you close it, and automatically resize the report preview window to full screen size. The options you set on Reports tab affect all reports you create.
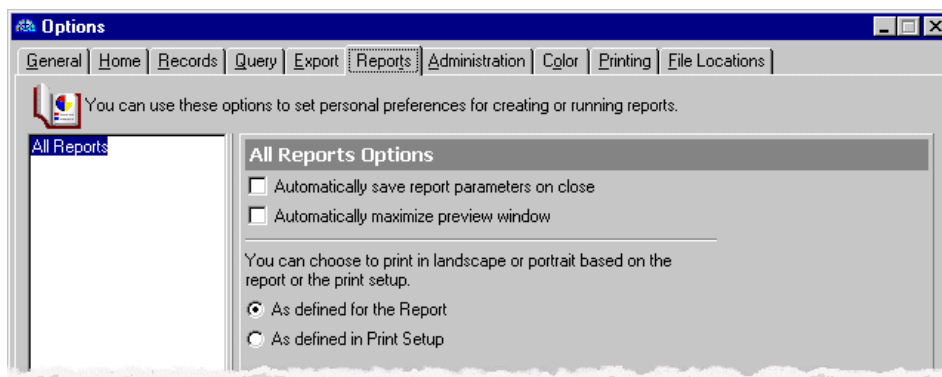
Note: Be aware that if you mark **Automatically save report parameters on close** and make unwanted changes to an existing report parameter file, you must click **Cancel** to close the report. Otherwise, the original report parameter file will be overwritten.

Automatically save report parameters on close. To automatically save report parameters when you close, mark the checkbox.

Automatically maximize preview window. If you want the report preview window to automatically appear as full screen size, mark the checkbox.

You can choose to print in landscape or portrait based on the report or the print setup. Select whether to use the print settings defined on the General tab of the report parameter file or the settings defined in Print Setup. You can access the Print Setup screen by selecting **File**, **Print Setup** from the shell menu bar.

Administration Options

For Administration options, you can define preferences for *Global Change*, *Import*, and the optional module *Accounting Queue*.

Global Change

> **Note:** Be aware that if you mark **Automatically save global change parameters on close** and make unwanted changes to an existing global change parameter file, you must click **Cancel**. Otherwise, the original global change parameter file will be overwritten.

For Global Change options on the Administration tab, mark the checkbox if you want to automatically save a global change parameter file when you close it. Be aware that if you mark **Automatically save global change parameters on close** and make unwanted changes to an existing global change parameter file, you must click **Cancel**. Otherwise, the original global change parameter file will be overwritten.
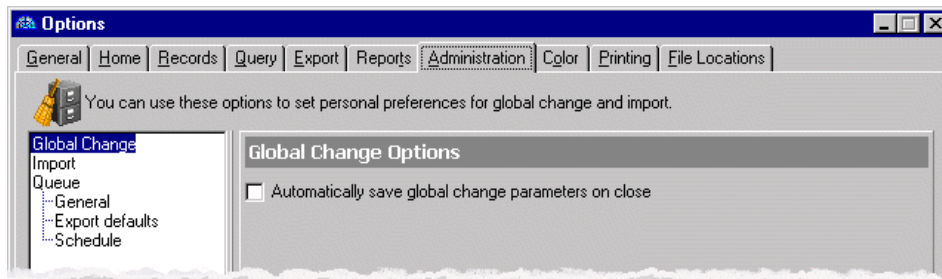
Import

For Import options on the Administration tab, mark the checkbox if you want to automatically save an import parameter file when you close it. Be aware that if you mark **Automatically save import parameters on close** and make unwanted changes to an existing import parameter file, you must click **Cancel**. Otherwise, the original import parameter file will be overwritten.
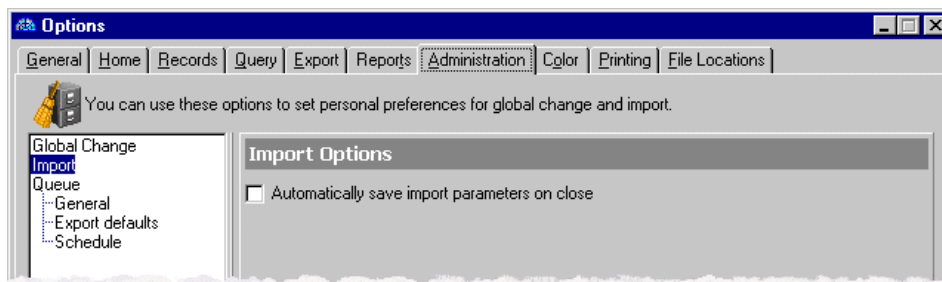
OPTIONS 14

Queue General

For Queue General options on the Administration tab, you can set the default program and module for which you want to run the queue. You can also mark the setting to create a control report and designate how you want it formatted and whether to export it, send it as e-mail, or print it. These options appear only if you have the optional module *Accounting Queue*.
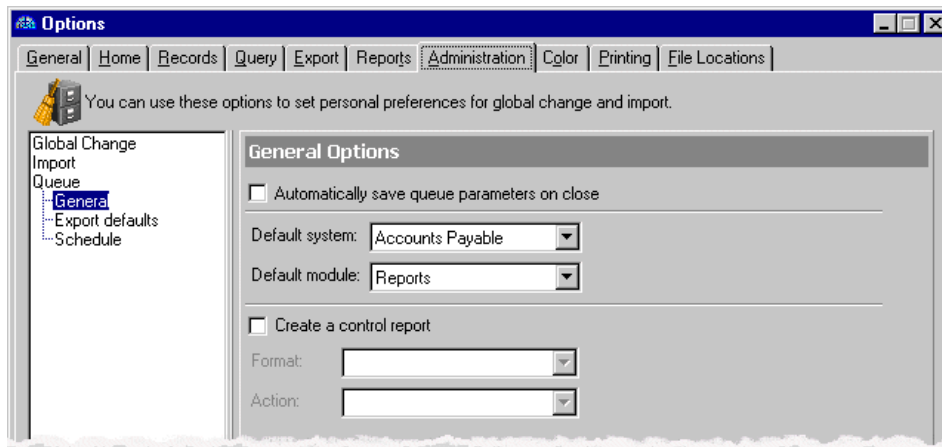
> **Note:** Be aware that if you mark **Automatically save queue parameters on close** and make unwanted changes to an existing queue parameter file, you must click **Cancel**. Otherwise, the original queue parameter file will be overwritten.

Automatically save queue parameters on close. To automatically save queue parameters when you close, mark the checkbox.

Default system. If you normally create queues for a specific program, select a default to save data entry time. This selection can be manually edited on new queues.

Default module. If you normally create queues for a specific area of the program selected in the **Default system** field, select a default to save data entry time. This selection can be manually edited on new queues.

Create a control report. Mark the checkbox if you want to automatically create a control report after running a queue. In the **Format** field, select Detail or Summary as the default report format. In the **Action** field, you can select to automatically print, export, or send the report as e-mail. If you select Print, fields appear for you to select the printer and the number of copies. If you select Export, fields appear for you to designate the export path and data format. If you select Send as mail, fields appear for you to enter the recipient(s) and designate the data format.

Queue Export Defaults

For Queue Export defaults options, you can set preferences for both export default types, **Query** and **Reports and Mail**, by toggling between the two options. These options appear only if you have the optional module *Accounting Queue*.
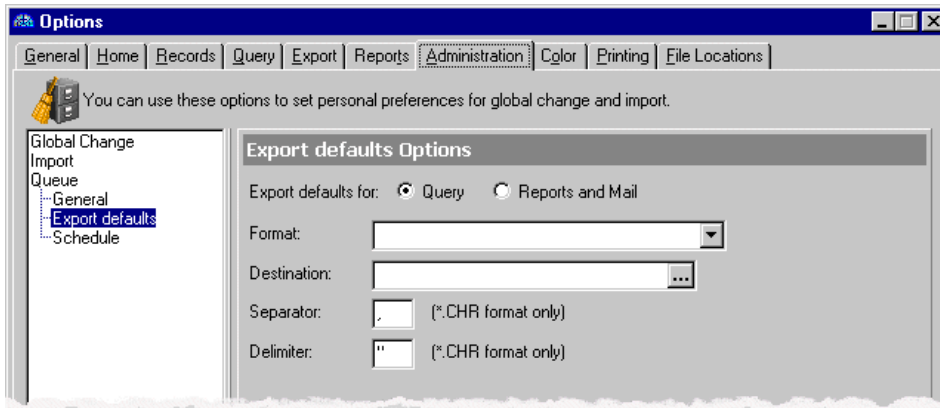
Export defaults for. Mark **Query** to set query export default options and then mark **Reports and Mail** to set reports and mail export default options.

Format. Select the default format to use when the export file is created.

Destination. Click the ellipsis button and browse to the correct directory where you want the file exported and saved.

Separator. Type the character separator to use. This field is only applicable if you selected a character separated values format.

Delimiter. Type the character delimiter to use. This field is only applicable if you selected a character separated values format.

Lines per page. This option appears only when **Reports and Mail** is marked and if you selected a paginated text data format. Enter a number in the box or use the arrows to increase or decrease the default number.

Use the same number/date formats selected in report. This option appears only when **Reports and Mail** is marked. If you want the number and date formats in the export file to default from the settings on the Format tab of the report parameter file, mark the checkbox.

Queue Schedule

For Queue Schedule options, you can set the program to show only the queues you have created. Queue options appear only if you have the optional module *Accounting Queue*.
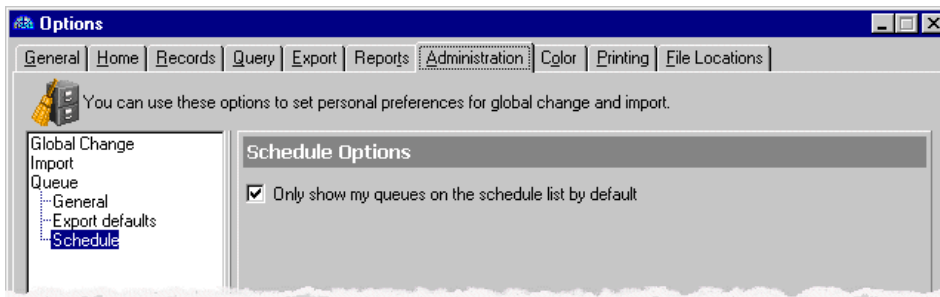
Only show my queues on the schedule list by default. To view only your queues and no one else's queues, mark the checkbox.

Fast Options

On the Fast tab, you can define general and processing preferences for datasheets created in *Fast!* for **Accounts Payable** or **Student Billing**. General options include settings for defaults, such as whether or not you want to use a default row on the datasheet and how to enter default values in fields. For Processing options, you can specify how you want to validate data entry, whether to display a confirmation message or create an output query when you commit records, and when to search for duplicate records.

Fast General
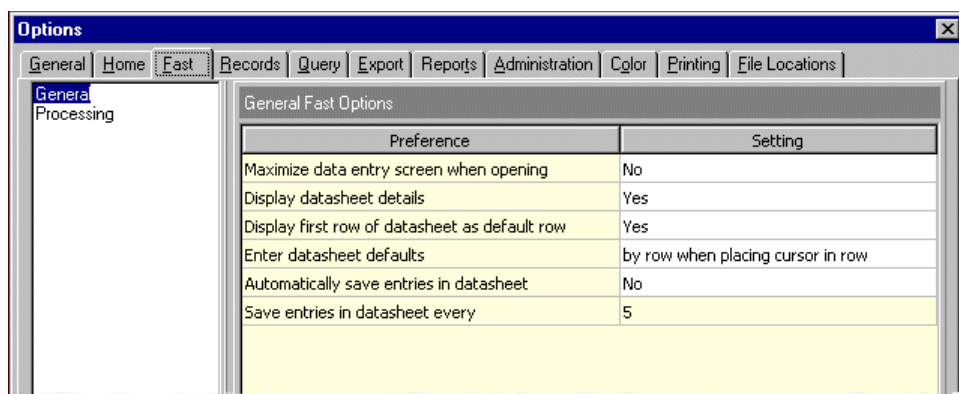
Maximize data entry screen when opening. To open the data entry screen automatically to the full size of your screen, select Yes. To open the data entry screen in a smaller window where you can still view open screens behind it, select No.

Display datasheet details. To display the **Default set** and **Description** fields on the datasheet, select Yes. To hide these fields by default, select No.

Display first row of datasheet as default row. To use the first row of the datasheet (D) as the default row, select Yes. Values you enter in this row can be used as defaults for all additional rows you add to the datasheet.

Enter datasheet defaults. You can select how to enter default values from the default row. If you select by row when placing cursor in row, default information appears in fields automatically when you select a new row. If you select by field with the F2 key, default information is entered when you place your cursor in a field and press the **F2** key.

Automatically save entries in datasheet. To have the program automatically save the datasheet at regular intervals while you enter data, select Yes.

Save entries in datasheet every. If you selected Yes for the Automatically save entries in datasheet option, enter the number of minutes between saves. The maximum interval is 60 minutes.

Fast Processing
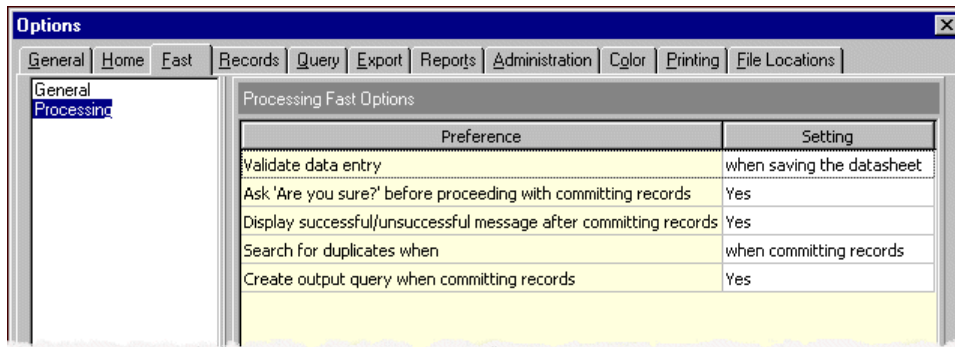
Validate data entry. select whether to validate data entry row by row or when you save the datasheet. If you validate row by row, when you move to another row, the program validates the entries in the row you are leaving. If you validate when saving, the program validates the entries each time the program automatically saves the datasheet or each time you manually save the datasheet.

Ask 'Are you sure?' before proceeding with committing records. If you want the program to display a confirmation message before committing, select Yes.

Search for duplicates when. Select when to run a duplicate records search on the datasheet. You can select "row by row" to check each row individually during data entry, or you can select "when committing records" to check all rows at one time when you commit records.

Note: The Search for duplicates options for FAST work only if you mark the **Automatically check for duplicate invoices** checkbox on the Invoice, Business Rules page in *Configuration*.

Create output query when committing records. If you select Yes for this option, an output query is created automatically when you commit records.

Color Options

Color options in each program enable you to customize fields and grids for easy recognition and distinction. You can set General and Legend color options.

To use default colors, click the down arrow and select from the list. To set custom colors, click the paint palette. When the Color screen appears, you can select from existing custom colors or click **Define Custom Colors** to use the color spectrum and gradient.

General

Note: To select a custom color, click the paint palette.

General color options apply to all programs.
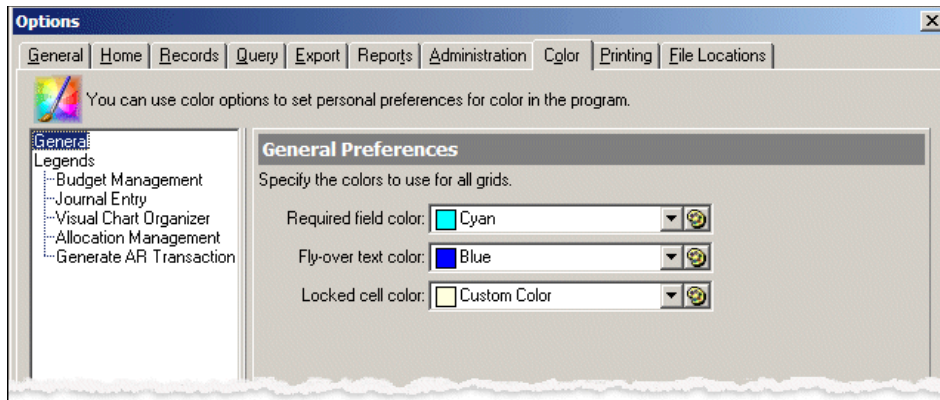
Note: You cannot save records until all required fields are filled.

Required field color. To make adding records quicker and easier, set a color for required fields. Being able to easily identify required fields prevents you from trying to save a record before required fields are entered.

Fly-over text color. Fly-over text color affects any field with table entries that can be edited. For example, in an account record in *General Ledger*, you can edit the field entries for Cash Flow, Working Capital, and Class on the Account tab. If you set a fly-over text color, when your cursor hovers over the field text, it appears in a different color. You can click the field and make edits.

Locked cell color. To easily see which cells in grids and tables cannot be edited, set a color in the **Locked cell color** field.

Legends

Legends color options are program-specific. For each legend type you have highlighted in the left tree view, options appear on the right. The following example is from *General Ledger*.
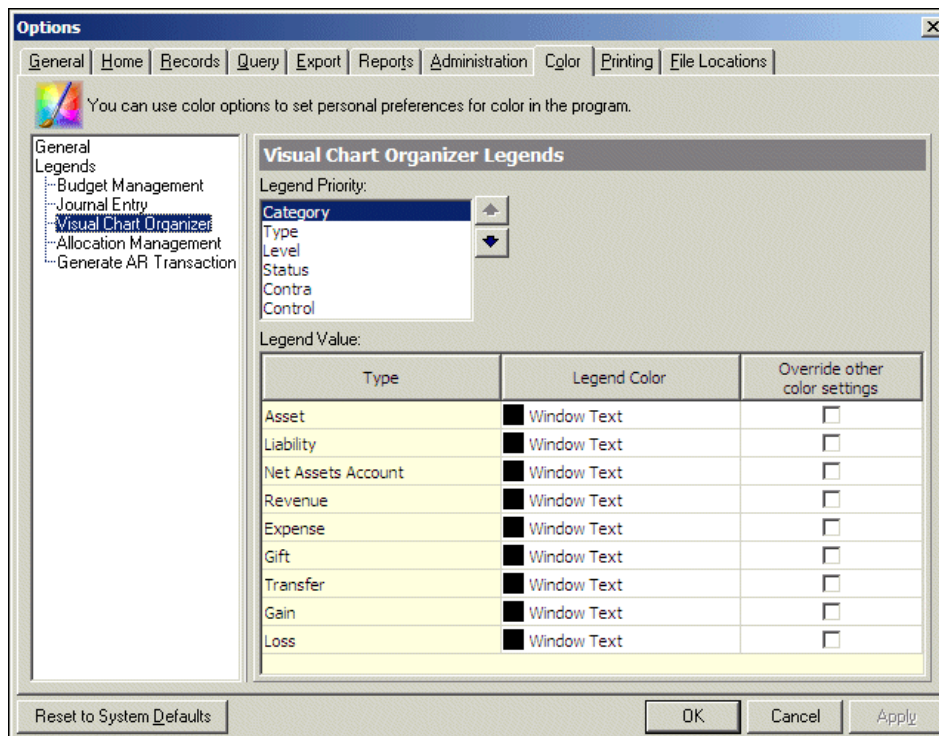
Legend Priority. You can set the level of priority for each color legend. The colors for the first selection in the **Legend Priority** box takes precedence over the colors of other legends that follow it. In the **Legend Priority** box, use the arrows to move selections up or down.

Legend Value. Options appear in the **Legend Value** grid based on the selection you have highlighted in the **Legend Priority** box.

For each item in the **Type** column, click in the **Legend Color** column to set a color. Click the down arrow to select a basic color or click the paint palette to set a custom color.

To ensure the legend color you set in the **Legend Value** grid is used rather than a pre-programmed color or a general color option, mark the checkbox in the **Override other color settings** column.

Printing Options

For General options on the Printing tab, you can define which report parameter files to use as the default when printing, previewing, and exporting reports and mailings. The reports appearing in the **Report** column vary, depending on the program from which you access options.

To set a default parameter file, click in the **Parameter** column, and then click the binoculars. On the Select Parameter File screen, you can select an existing parameter file previously created in *Reports* or you can add a new parameter file. For more information about creating a report parameter file, see the *Reports Guide* for the specific program.
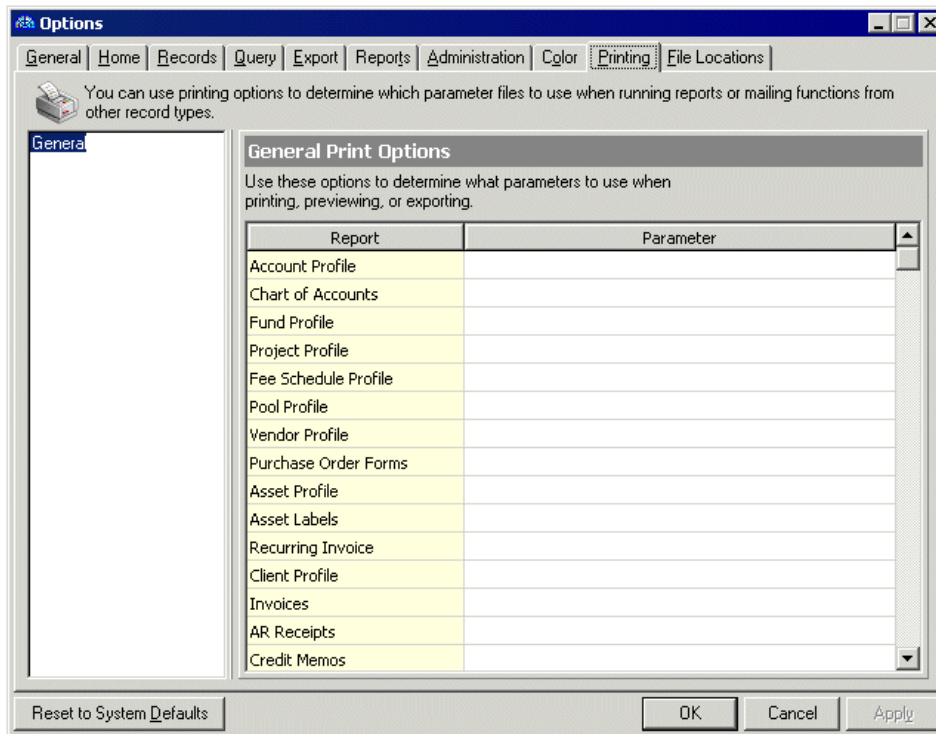
File Locations Options

On the File Locations tab, you can set default directory paths to locations where files are saved when exported from the program. This saves time so you do not have to map the location each time. Also it increases consistency, reducing the possibility of "lost" files. To select the default file locations for word processing documents and letters, exported or imported data files, and *Excel* spreadsheets, in the **Location** column type the path or click the ellipses to access the Browse for Folder screen.

Finding Help

If you need information as you work in Blackbaud programs, you can use the help file embedded in the program.

The help file is a compiled Microsoft HTML Help system. It provides information about the many features of Blackbaud's software, as well as step-by-step procedures to guide you through the program's functionality.

Accessing Help

Our help file is context sensitive, which means you can quickly access topics about the program area in which you are currently working. For example, you want to add payment information to an invoice in **_Accounts Payable_**, but you have not done that before. While the invoice record is open to the Payment/Credits tab, press **F1** to open the help file to the Managing Payments and Credits topic. From there, you can access procedures about scheduling an invoice payment, paying invoices, or applying credit memos.

To access the help file Welcome page from the menu bar, select **Help**, **Help Topics**. To access the help file Welcome page from the navigation bar, click **Help**, and select **Help Topics**.

Using the HTML Help Viewer

The HTML Help viewer is the window where help topics are displayed. When viewing help, you can maximize the viewer or resize it to your liking. The standard buttons for minimizing and maximizing the window are located in the upper-right corner.

When you select a help topic, whether from the Search, Index, or Table of Contents tabs, the topic title appears at the top of the page. Below the title is a list of related links. This information provides a helpful context while you navigate in the help file. For example, you use the Search tab to find information about invoices, then you open an invoice topic displaying the title "Generating Invoices". By viewing the list of links under the title, you can tell that the topic relates to accounts recievable invoices.

Buttons in Topics

Throughout the help file, links appear so you can find more information about similar topics. When a conceptual topic corresponds directly to a procedure, the **How?** button appears at the bottom of the topic. Likewise, when a procedure corresponds directly to a conceptual topic, the **Why?** button appears on the procedure.

 Click the **How?** button to view the procedure for the information in the current topic.

 Click the **Why?** button to read background information relating to the procedure.

The HTML Help viewer also includes a **Back** button for navigating to the previous topic or page.

Using Tabs and the Navigation Pane

You can access all areas of the help file by using the tabs on the left side of the HTML Help viewer. When you select a left-hand tab, information appears in the navigation pane below the tab.

Contents

The Contents tab displays books and pages representing categories of information in the help file. When you double-click a closed book, it opens to display its contents. When you double-click an open book, it closes. When you click pages, topics appear in the right-hand pane of the HTML Help viewer.

Index

The Index tab displays a multi-level list of keywords and keyword phrases. You can type in keywords to help you locate specific ideas and concepts. To open a topic associated with a keyword, select the keyword and then click **Display**. If the keyword is used with more than one topic, a Topics Found dialog opens so you can select a specific topic to view.

Search

On the Search tab, you can search the help file for specific words. A list of all the topics containing that word appears. Full-text searching looks through every word in the help file to find matches. There are also options to search previous results, find similar words, and search only topic titles. When the search is completed, a list of topics appears so you can select a specific topic to view. A basic search consists of the word or phrase you want to find. You can use similar word matches, a previous results list, or topic titles to further define your search.

Basic Rules for Searching

Here are a few basic rules for creating full-text search queries:

- Searches are not case-sensitive, so you can type your search in uppercase or lowercase characters.
- You may search for any combination of letters and numbers.
- Punctuation marks such as the period, colon, semicolon, comma, and hyphen are ignored during a search.
- You can group the elements of your search using double quotes or parentheses to set apart each element. You cannot search for quotation marks.

Finding Information with Full-Text Search

Click the Search tab, and type the word or phrase you want to find.

To...	Do...
Search only topic titles	Mark **Search titles only**.
Find words similar to your search term	Mark **Match similar words**.
Narrow your search	Mark **Search previous results**.
Highlight all instances of search terms that are found in topic files	Click **Options** at the top of the view screen and select "Search Highlight On".

In addition, you can use boolean operators with the keywords to make the search more specific. (For more information about Boolean operators, see "Advanced Search Techniques" on page 153.)

When you are finished entering keywords and setting search options, click **List Topics**. In the **Select topic** box, select the topic to view. Click **Display**.

To sort the topic list, click the **Title**, **Location**, or **Rank** column heading. Clicking **Title** alphabetizes the list. Clicking **Rank** sorts the list by the number of times the keywords are used in the topic.

Advanced Search Techniques

When using the full-text search feature in help files, you can use advanced techniques, such as wildcards and boolean operators, to narrow your searches for more precise results.

Wildcard expressions

You can search for words or phrases using wildcard expressions. Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. The table below describes the results of these different kinds of searches.

Searches for	Example	Results
A single word	mail	Topics that contain the word "mail", and grammatical variations, such as "mailings".
A phrase	"journal entry" or journal entry	Topics that contain the literal phrase "journal entry" and all its grammatical variations. Without the quotation marks, the query is equivalent to specifying "journal AND entry," which will find topics containing both of the individual words, instead of the phrase.
Wildcard expressions	install*	Topics that contain the terms "install," "installing," "installation," and so on. You can also use a question mark (?) as a single character marker when searching. For example, if searching for a state abbreviation, "S?" would return SC and SD.

Boolean operators

The AND, OR, NOT, and NEAR operators enable you to precisely define your search by creating a relationship between search terms. The following table shows how you can use each of these operators. If no operator is specified, AND is used. For example, the query "validate database" is equivalent to "validate AND database".

Note: The /, &, and ! characters don't work as boolean operators; you must use OR, AND, and NOT.

Searches for	Example	Results
Both terms in the same topic	merge AND query	Topics containing both "merge" and "query"
Either term in a topic	preferences OR options	Topics containing either "preferences" or "options" or both
The first term without the second term	vendor NOT report	Topics containing "vendor", but not "report"
Both terms in the same topic, close together	post NEAR credit memo	Topics containing "post" within eight words of "credit memo"

Favorites

On the Favorites tab, you can store a list of your favorite or most frequently used help topics. Whenever you open the help file, you can quickly go to the topics you view most often by selecting them from this tab. It is simple to add topics as favorites — when you have found a helpful topic, go to the Favorites tab and click **Add**. You can update the list at any time by removing topics you no longer want included as favorites.

Using Buttons

Our help file contains buttons above the navigation pane and viewer to help you access information quickly.

Back

Use the **Back** button to quickly navigate to the previous topic or page.

Refresh

To reload a help topic that did not fully appear, click **Refresh**.

Print

While using the help file, you can print topics and information directly from the HTML Help viewer. The available print options can vary depending on the version of *Windows* and *Internet Explorer* on your system.

To print a single topic

1. Click **Print**.
2. Mark **Print the selected topic**, and click **OK**.

To print all topics in a selected book

1. Click **Print**.
2. Mark **Print the selected heading and all subtopics**, and click **OK**.

Options

The **Options** button opens a menu with selections for hiding the left-hand tabs, going back and forward, stopping a topic or Web page from loading, refreshing the information displayed in the window, printing, and turning search highlighting on or off. You can also access Internet options from this menu.

Glossary

The glossary provides a list of words and short phrases, and their definitions, related to the program. To access the glossary, click the **Glossary** button at the top of the view screen or click the link that appears at the bottom of each topic.

Blackbaud on the Web

Because the HTML Help viewer uses components of the Internet Explorer browser, it can take you to websites. To visit the Blackbaud website, click Blackbaud on the Web.

Educational Services

You can find additional information about Blackbaud products on our website at www.blackbaud.com. We encourage you to bookmark this site and check it often. If your organization participates in our maintenance programs, you can access the Support area of our website where you can download latest versions of our software, review the user guides, participate in forums and much more. You can also use Knowledgebase to search for solutions to any issues you may encounter.

To help you get the most out of your Blackbaud software, we also offer a wide selection of education options:

Blackbaud University. Blackbaud offers a variety of classes in Charleston, South Carolina. For more information about class descriptions, schedules, or online registration, visit the Training area of our website at www.blackbaud.com.

Regional education. Blackbaud now offers education in more than 30 locations throughout North America. State-of-the-art training facilities provide an ideal setting for you to develop your knowledge and skills with the software.

On-site education. Training at your organization's site is a cost-effective option if your organization cannot afford to have staff members away from the office for several days. The Blackbaud instructor can teach standard course curricula or create a special training program to meet your organization's specific needs.

Index

P