TRICKS OF THE TRADE
Suggestions for Easier Use of FIS Transaction Processing

Helpful Hints

A. The F3 key acts in the same way as double clicking. Use F3 key in place of double clicking with the mouse. F2 followed by the letter D does the same.

B. For those who prefer to use the keyboard rather than the mouse, pressing the F4 key will activate the menu bar at the top of the screen. You can then simply type the underlined letter of any choice to select it, without using the mouse.

C. In the FIS, you can highlight fields with your mouse, and do copy and paste just as you would do in word processing or spreadsheet applications. This can be useful in copying a universal user ID for looking up information in the Labor Distribution Inquiries screens, or an account number when you need to use it in another search or document.

D. If you are looking at a list of something in the FIS (such as your inbox, the results of a search, the document groups, the list of reference tables) you can move up and down through the list by using the alt + page down and alt + page up keys.

E. In most FIS documents, you should use the "Tab" key to move from field to field as you enter data into the document. Using the mouse to place your cursor in fields may result in errors or frozen documents.

F. Pull-down arrows beside a field indicate the presence of a lookup window behind the field.

G. For documents that allow you to insert or delete lines, you can use the F6 key (insert) or F7 key (delete) instead of clicking on the buttons.

H. Wildcards can make your searches much easier and faster. A wildcard combines the F2 key and other characters or symbols on the keyboard to send a signal to the system. This signal says, "what follows after the F2 key is a command…not just a simple letter or symbol." .

Some common uses of the F2 key plus another character include:

F2+ Q = exit from the current window/screen/dialog box/error message. This should be only used when one is "stuck."
F2 + P = call up the Print function (but be sure you know what you are printing!)
F2 + D = double click
F2 + Z = zoom

These F2 combinations are used in search fields to help narrow down results:

F2 + * (or) 8 [using the symbols/numbers above the keyboard] = include any characters following this symbol
F2 + > = include anything greater than what follows
F2 + < = include anything less than what follows
F2 + ! = do not include what follows
F2 + ? = match any single character

See the list of keyboard shortcuts at the end of this document for more examples. The F2 key is the "gold" key.

Document Search Screen Tips

A. If you are in the Document Search screen, double click or F3 in the Doc Number field to display the number of the last document that was opened (as long as that document was not in Status: ?, and no other action was taken between closing the document and conducting the search). If you need to search for a document you had opened previously in your FIS session, click on the down arrow to the right of the message bar at the bottom of the FIS screen. This will bring up a list of all the messages in the message bar, possibly including the document number. If there are more than 6 previous messages, a scroll bar will be displayed.

B. The buttons located in the Search Results section are sort buttons. Once you have entered criteria, clicked on search, and received results, clicking on the various buttons will sort the results in ascending or descending order. For example, you could sort your results by approval status, by create date, by initiator ID, etc.

C. To find in whose inbox an unapproved document resides, find the document using Document Search, then with your cursor on the document number in the search results section, click on the "Route" button at the bottom of the screen. Double click (F3) on the first notification user ID that does not have an "action" date to get the name and department of the person who has not yet taken action on the document.

D. If you need to check for documents awaiting a specific person's approval, select the "Find By Routing" button on the Document Select screen. Fill in the user ID of the approver in the "Notify ID" field, and in the status field boxes, enter "A" and "N". (Double click on the status field box to see other possible combinations).

Hidden FIS Information

There is a lot of "hidden" information under the surface of FIS documents, screens, windows, and fields. Some of the most useful include:

1. Double clicking (F3) on the status of a document (such as ?, I, P, R, O, A, C) will give you additional information, including the FIS abbreviation for the document type (i.e., DI for Distribution of Income and Expense).

2. Double clicking on the user ID of the document initiator displays a User Inquiry screen with more information about the initiator (e.g., full name, department, etc.)

3. Double clicking on an FIS Document number displayed on an Inquiry screen (such as Balances, Labor Distribution) or search screen will open that particular document.

4. On screens with a Position Number, double clicking (F3) on the number will bring up the Position Inquiry screen. From this point, it is possible to see all information about this position, including rank, person, and funding.

5. Many fields in FIS documents are expansion windows. Double click (F3) on fields to see whether there is additional information in the field (such as the description, explanation, and notes fields).

6. Several common fields in documents allow "drill down" to a lot of additional information. Account number and object code are two of these. For financial documents, if you double click on the organization code displayed below the account field, you will find more information about the organization, including its full name. Also on financial documents, if you double click on the letter/number displayed below the dollar amount field on each accounting line, the override reason is provided (if there is one).

7. If a document has been routed and not yet approved, double clicking in the document Org Ref field will provide the Pending Ledger Display.

Special Things About Financial Documents

A. Financial documents with accounting lines have a few "tricks" themselves. Specifically:

1. If a document is in “P” status (is waiting for account manager or primary delegate approval), the approver can insert or delete accounting lines to change the amount distributed between accounts. The document total cannot be altered, and the only accounts that can be used are ones for which the approver is the account manager or delegate.

2. If your cursor is resting on an accounting line in a document, that account and object code information will be automatically carried into the criteria fields if you look at the Balances choice on the Inquiries menu.

3. It is possible to see all the accounting lines in the “From” or “To” side by placing the cursor on one line in either side, then selecting Edit/Zoom from the menu.

B. An existing financial document can be used as a template for creation of a new financial document. Use the Document Search screen to find the document you want to use as a basis for your new document, open the document, and then select Workflow/Template. If this option is not available, you cannot template that particular type of document.

Other Miscellaneous Tips

A. Documents that you are creating, even if they are not completed, can be saved to your inbox (menu File/Save). They can then be retrieved later from your inbox and completed, or cancelled. Once a document has been saved to your inbox, it has Status: I. At that time, the document officially “exists” in the system, and others can find it through document search.

B. Users can save documents in their own FIS File Folders, for ease in finding crucial documents or checking to be sure special documents are approved in a timely fashion. Use the menu File/Place in Folder. You may need to create a folder before saving your document to the folder. To find a document you have saved in a folder, go to the Document Search screen and select the “Find in Folders” button.

C. Cover sheets for Disbursement Vouchers (DV) can be printed by selecting File/Print Cover Sheet from the menu. This can be done before the document is routed, or by retrieving the DV using the Document Search screen.

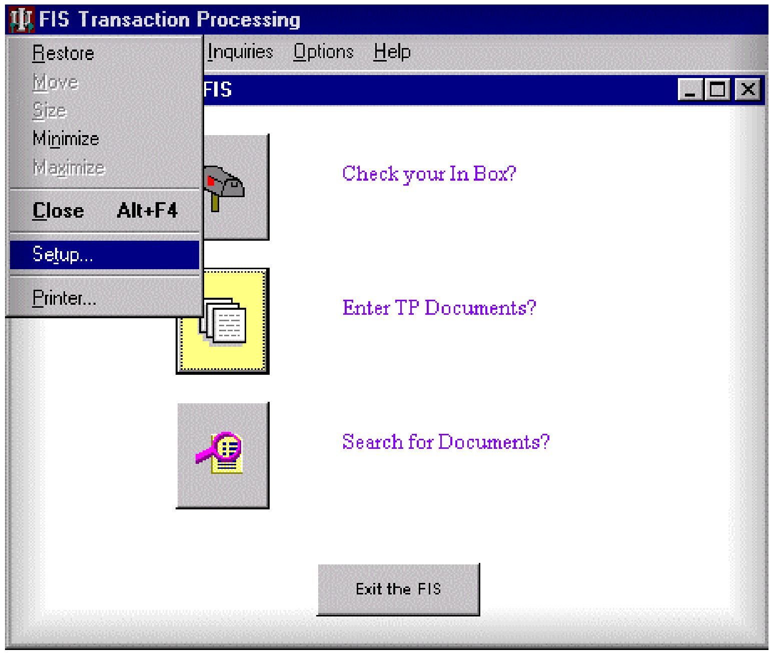
D. If File/Print is not an option on any window or screen you are viewing, pressing the F12 key or using F2 + P will bring up the Windows print screen. Caveat: This command will print <u>everything</u> in that window or screen, even text not visible in the window (look for a scroll bar to the right of the screen!)

E. When a document has been routed yet not approved, it is possible to ask for the document to be cancelled. The normal process is to search for the document, then use the menu choice Workflow/Cancel Document to send a message to the next approver that the document should be disapproved. However, you should first check the routing to see whether the next approver is a workgroup (on the Document Routing Log, there will be check marks in the WGrp (workgroup) boxes at the right). Because such a message only goes to the <u>last</u> person in the workgroup, it is possible another workgroup member would not see the message and inadvertently approve the document. In these cases, it is best to call someone in the workgroup and alert them to disapprove the document, not use the FIS “cancel document” function.

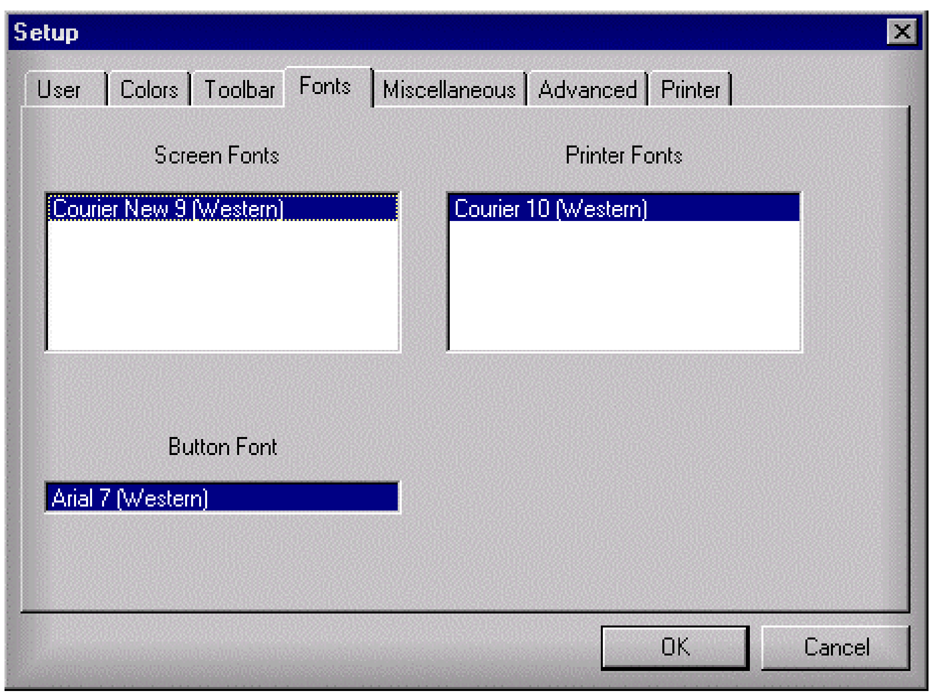
How To Change FIS Font for Ease in Distinguishing Letters and Numbers

Often it is difficult to distinguish letters from numbers in TP document numbers, position numbers, and other data in the FIS. Zero and the capital "O" look alike, as do the number 1 and the small letter "l". This can present problems, not only in FIS searches and document creation, but also when trying to align FIS information with other university systems.

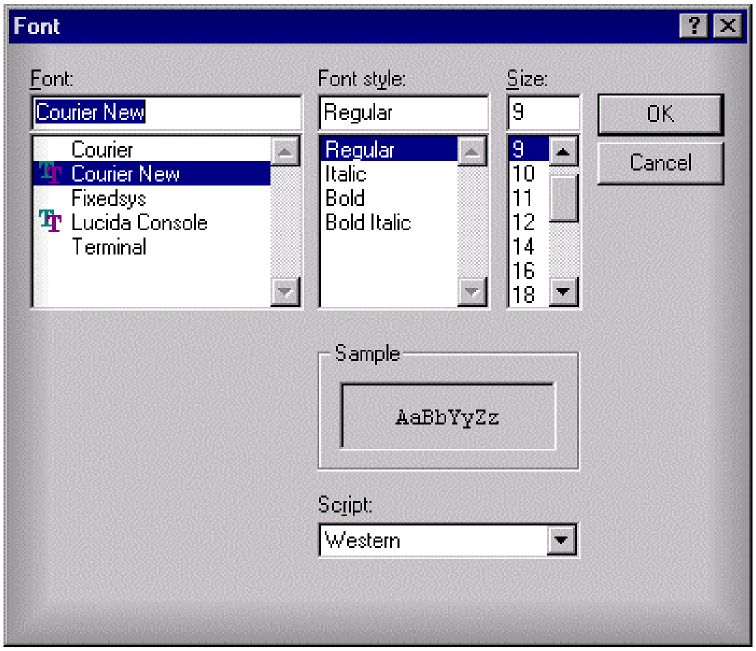
To change your font, click on the IU symbol or the "hash mark (-)" to the left of the words "FIS Transaction Processing" at the top left of your FIS window. Choose "Setup" from the menu.



In the Setup window, choose the "Fonts" tab. Under the section "Screen Fonts," double click on the existing font (in the example below, "Courier New 9 (Western)" is the default).



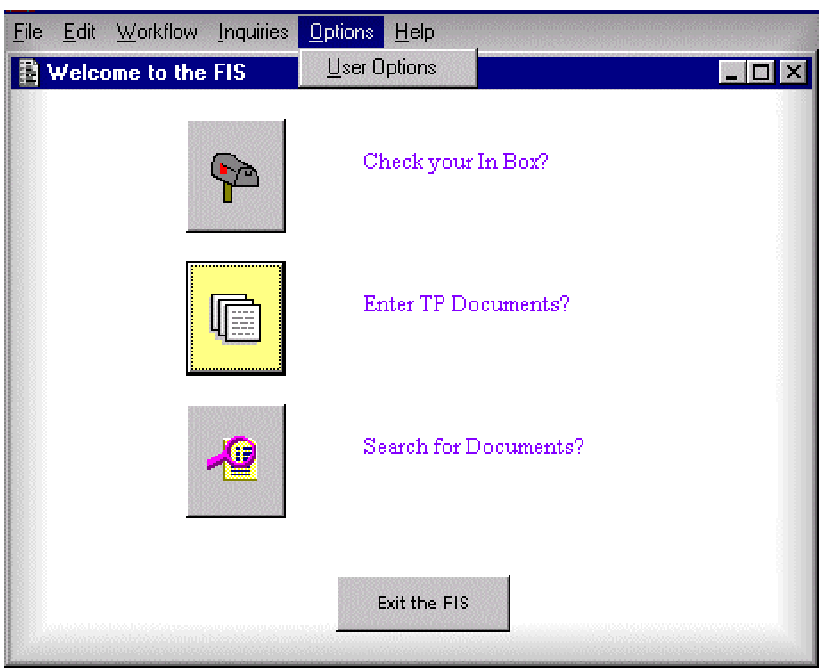
In the Font window, select the size 10, and then click on the OK button.

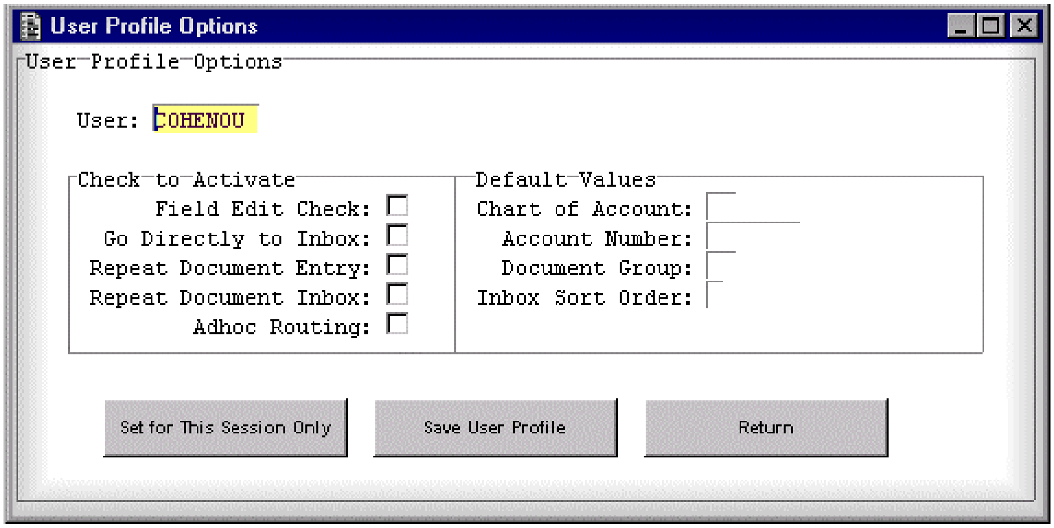


Click on the OK button on the Setup window. You will need to exit the FIS for the new setting to be implemented.

<u>Change User Options to Customize TP for Yourself Based Upon Your Work Needs</u>

Select "Options" from the menu bar, then "User Options."





The left section provides boxes to check if you wish to activate certain capabilities.

1. Field Edit Check: When selected, every field in every document will be validated by the system before you are allowed to enter information into the next field. As this can be extremely time consuming and may seriously tie up the system, it is not recommended that this feature be used.

2. Go Directly to Inbox: If this field is checked, every time you log in to the FIS your inbox will be the first screen you see. For people who are more likely to review and approve documents than create them, this saves the step of having to click on the "Inbox" button on the main "Welcome" screen.

3. Repeat Document Entry: Once you have created and routed a new document, the system will automatically bring up a blank copy of that same kind of document. For someone entering a large number of the same transactions at one time (such as Cash Receipts), this can be a time saver. (Note: If you have this user option selected, you cannot do a document search for the previous document you created by double-clicking on the document number field at the Document Search screen immediately after routing your first document.)

4. Repeat Document Inbox: When there are many documents in your inbox to review or approve, you can facilitate the process by selecting this option. Once you have opened a document and approved it, the next document in your inbox is automatically opened for you.

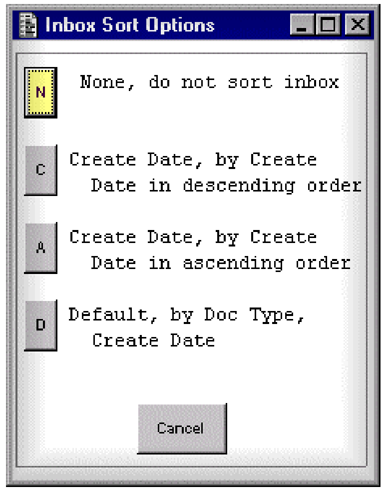
5. Adhoc Routing: The FIS contains a feature that allows you to route documents for either approval or review to FIS users not in the normal review/approval chain for that document. If this option is selected, when you initiate or approve a document, you will be automatically prompted with a dialog box asking whether you want to adhoc route the document to another user. If you click "yes" you are given a window in which to type the person's FIS user ID and your message. You then select to route the document "for approval" or "FYI." People to whom you adhoc route a document for approval must take action on that document before it goes any further through the normal document routing. Those you send an FYI copy will get it once the document is finally approved.

The right section allows you to set default values that may help you customize the FIS to your specific uses.

1. The first two fields, Chart of Account and Account Number, are not operational. Any values entered in these fields will be ignored.

2. The field Document Group indicates the group of documents that will appear on the Document Group Selection screen (when you select the "Enter TP Documents" button on the FIS main Welcome screen). The default group is the Financial Documents (FI, or a blank field). If you double click on the blank field, a list of all the possible document groups appears. You may select the document group that you use most frequently as your default if you choose.

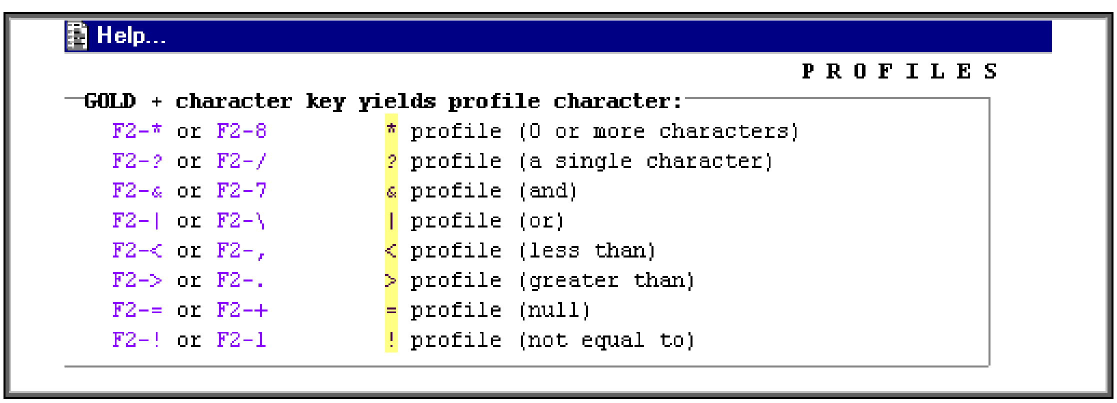
3. Inbox Sort Order allows you to choose in what order you want documents to appear in your FIS Inbox. Double click on the field to see the possible choices.



Once you have chosen your options, you have three ways to finish: you can click on the box "Set for This Session Only" (i.e., as long as you are logged into the FIS); if you want to change your options completely, choose "Save User Profile", or if you wish to return to the options that were previously set, click on "Return."

Keyboard Shortcuts and Navigation Tips

When you are in the FIS application, if you hit the "shift" and "F1" keys together, you will access the Help screen (below) that shows you all of the possible ways to move through the FIS screens using a variety of methods, including the function keys (F1, F2, etc.), the "gold" keys that we call "wildcards," keyboard shortcuts, and mouse shortcuts. To leave this Help screen, click on the red X in the box in the bottom left corner of the screen.



K E Y B O A R D

Keyboard shortcuts

In the tables below, <A> means that the function can also be activated with Ctrl-A or Gold A. Similar for other letters.

Form navigation

Tab or Keypad Enter		Next field
Shift-Tab		Previous field
ESC	<Q>	Exit current form (use only if stuck)

Occurrence navigation

Alt-PgDn		Next occurrence
Alt-PgUp		Previous occurrence
Shift-Alt-PgDn		Next screenful of occurrences
Shift-Alt-PgUp		Previous screenful of occurrences
Ctrl-Alt-PgDn		Last occurrence
Ctrl-Alt-PgUp		First occurrence

Occurrence manipulation

Alt-Delete		Remove occurrence
Alt-Insert		Add occurrence

Function Keys

F1		Help
Shift-F1	<K>	Keyboard Help (this screen)
F2		Gold
F3	<D>	Detail (same as double-click)
F4		Menu
F5		<nothing>
F6		Add Occurrence
F7		Remove Occurrence
F8	<Z>	Zoom
Shift-F8		Quick Zoom (full screen)
F9	<M>	Message Frame
F10		Menu (toggle)
F11	<A>	Accept
F12	<P>	Print

Text navigation

All these keystrokes can be combined with Shift to select text in the direction indicated.
These keys work only within fields, not between occurrences.

Right arrow	Next character
Left arrow	Previous character
Ctrl-Right arrow	Next word
Ctrl-Left arrow	Previous word
End	End of line
Home	Beginning of line

Down arrow	Next line
Up arrow	Previous line
Ctrl-Down arrow	Eight lines down
Ctrl-Up arrow	Eight lines up
PgDn	Next page
PgUp	Previous page
Ctrl-PgDn	End of text
Ctrl-PgUp	Beginning of text

Text manipulation

Shift-Del	<X>	Cut
Ctrl-Ins	<C>	Copy
Shift-Ins	<V>	Paste
	<O>	Toggle insert/overstrike

Miscellaneous

Ctrl-Shift-Ins	Insert text from file into current field
Ctrl-Shift-Del	Remove text from current field into file

M O U S E

Selecting Text with the Mouse

Left Drag	Select characters
Shift-Left Click	Extend selection
Right Double Click	Select line
Shift-Right Click	Select all text

Moving Text using the Mouse

To move text within a field using the mouse:

1. Select the text to move.
2. Press (and hold) the left mouse button over the selection.
3. Drag the mouse until the | cursor is at the target location.
4. Release the mouse button.

Other Mouse Operations

Left Double Click	Detail