SeniorSystems

New Search Windows
Release Bulletin

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NEW SEARCH WINDOWS AND GENERAL SEARCH ENHANCEMENTS FOR ALL SENIOR SYSTEMS' APPLICATIONS

For all **Senior Systems**' applications, newly redesigned windows and features provide enhanced ease of use with increased search capacity.

General Search Enhancements

In addition to the major enhancements made to a number of search windows (see page 3), some general enhancements have been made to the rest of the search windows.
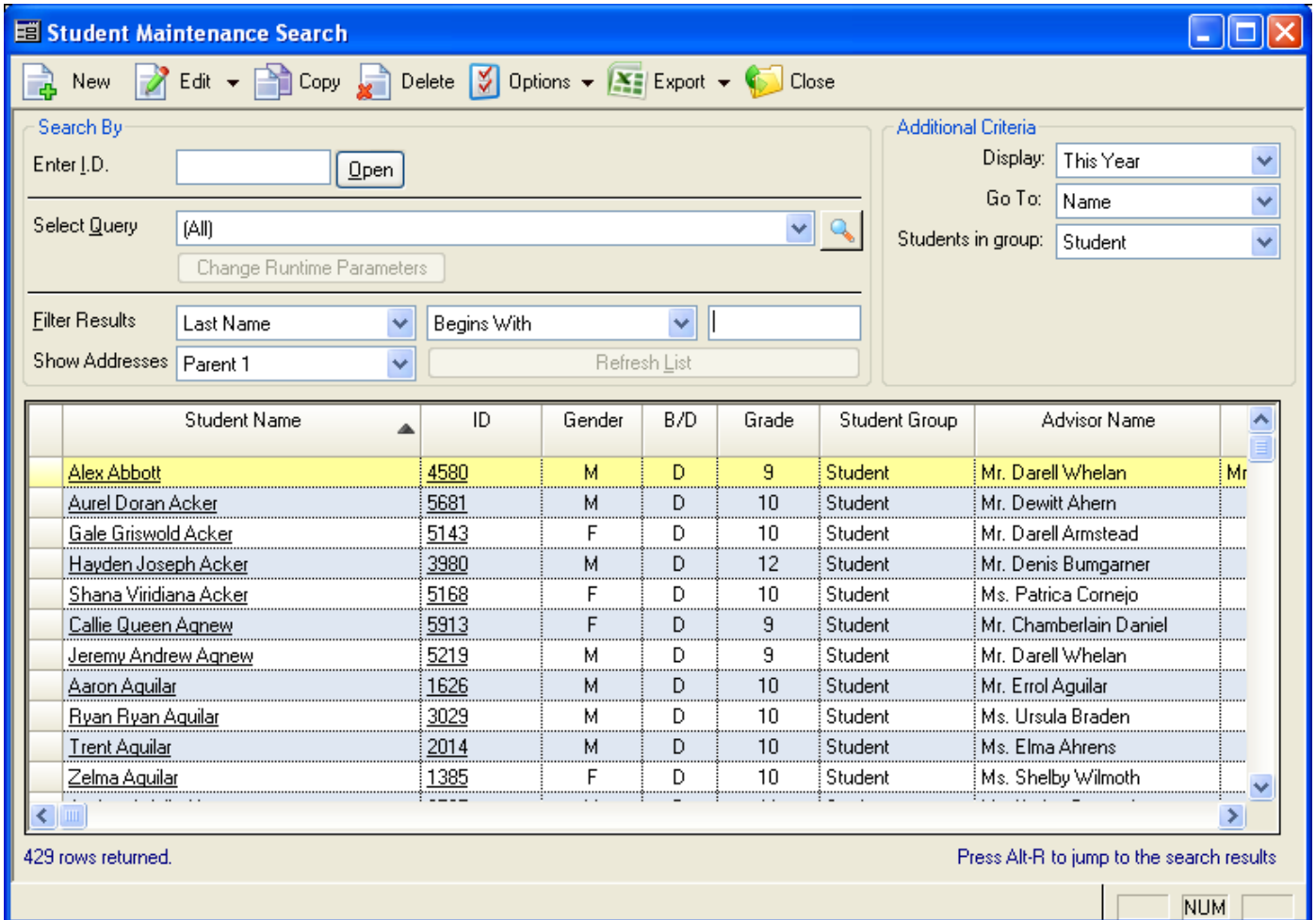
Search enhancements include:

- **Search** windows can be expanded and resized. Click on the gray box 🔲 on the upper left-hand corner of the window to save your settings.

- a magnifying glass 🔍 has replaced the rolodex icon for searches in all windows

- table rows appear in alternate colors (white/light blue)

- selected rows are highlighted in yellow, where they previously appeared in black

- tables on any window can be exported to Microsoft Excel™ by right-clicking on the table

Overview of the New Search Window

The **Search** window has been changed to provide a more powerful, yet easier to use interface for performing searches. The general appearance of the window has changed, new filtering methods are available as are several enhancements supporting ease of use.

See figure 1 for an example of a new **Search** window.

FIGURE 1. New Student Search

Enhancements can be specific to the application they are supporting therefore you may not see every option in every **Search** window. Figure 1 shows a sample **Search** window for **Registrar**.

See Applications and Windows Affected on page 4 for a table describing the menus and windows in every application that are impacted by this change.

New Search Window Features

The overall look and feel of the **Search** windows have been changed. Table rows alternate between white and light blue and when you select a row, the entire row highlights in yellow, as opposed to black. You can add, remove, sort and export all or specific columns.

When performing a search, you can now look for any field within a column set, or for address names across multiple address types.

Since the amount of information that appears on the window can be quite significant, you can now resize the **Search** window to display more real estate. Using the **Options** drop-down menu, you can save or clear your settings.

New **Search** features include:

- expand the height and width of the **Search** window to display more columns and rows

- save user-specific settings for window location, size, columns size and order, filter criteria, etc.

- add and remove columns from the **Search** window

- sort by any column by clicking on the table column header

- search for any field defined in columns

- export **Search** results directly to Excel

- advance export to export all, or some of the available columns

- more filters to enhance searches

- display edit history (up to 10 is the maximum)

- initiate a query from the **Search** window (i.e., **RG**, **DN**, **PL Student Maintenance**)

- custom name formatting for Students, Faculty and Parents

- display the number of rows returned in the results list

- search for address names across P1, P2, and Z addresses

- hot keys for cursor positioning, i.e., use **[Alt]** and **[F]** to place cursor into the filter result field

- clear settings to return to the default window

Applications and Windows Affected

Use this table to see what menus and windows have changed in **Senior Systems**' applications.

Menu/Window	Affected Senior Systems' Applications
Student Maintenance	**Accounts Receivable** **Dean's Office** **Enrollment Management** **Placement** **Registrar** **Summer School**
Inquiry/Applicant Maintenance	**Admissions**
Customer Maintenance	**Campus Store**
Product Maintenance	**Campus Store**
Vendor Maintenance	**Accounts Payable**
GL Account Maintenance	**General Ledger**
Faculty/Staff Maintenance	**Accounts Receivable** **Dean's Office** **Registrar** **Scheduling** **Summer School**
Course Maintenance	**Registrar** **Scheduling** **Summer School**
Section Maintenance	**Registrar** **Scheduling** **Summer School**
Address Maintenance	**Student/Parent Addresses**
Constituent Maintenance	**Alumni/Development**

New Ways to Filter Data

There are now more filters to enhance search capability. Previously, there were a few methods for filtering, but the search filter always defaulted to *Is Greater Than or Equal To*. This meant that if you were searching for 9th graders, the results would display all 9th graders, but also every grade after that. From the **Student Maintenance Search** window, there are drop-down menus to specify searches for specific parameters (figure 2).
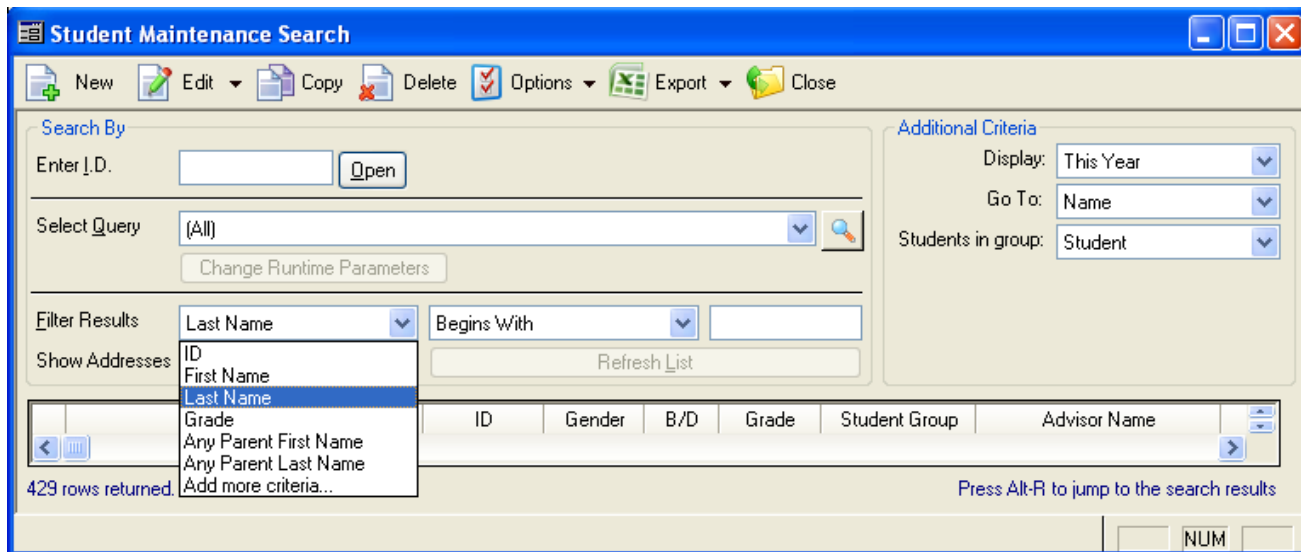
FIGURE 2. Student Search

Now, **Any Parent First name** and **Any Parent Last name** can be used to search for a parent name across the **Name1** and **Name2** fields within an address. By setting your address choice to **(All)**, you can search across both of the name fields in your **P1**, **P2** and **Z** addresses at the same time. There are also more filter options as shown in figure 3 to fine-tune your search.
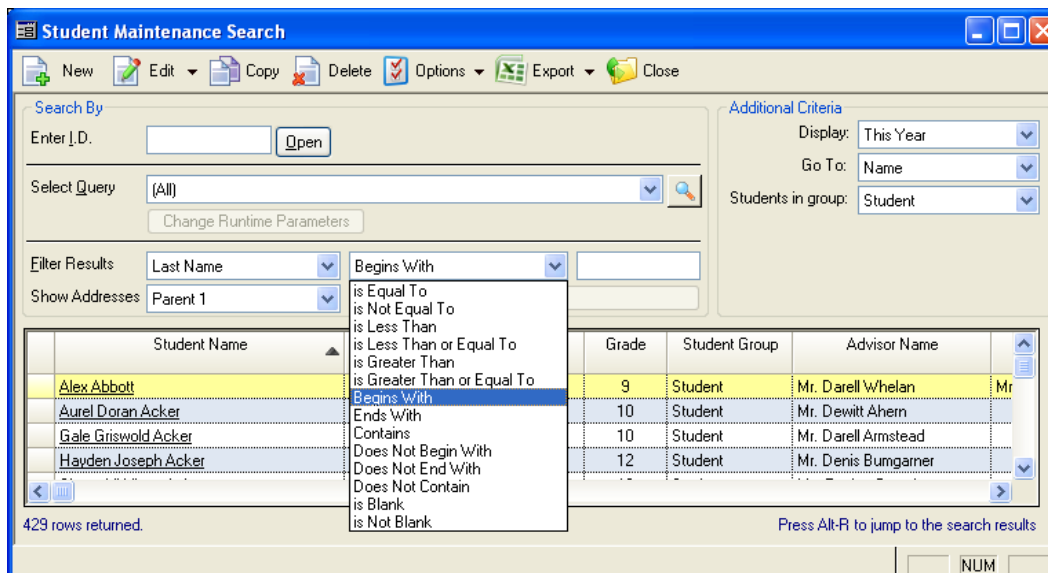
FIGURE 3. Student Search

Note: You will return multiple rows for students with multiple addresses if you display more than just the P1 address.

Manage the Appearance and Behavior of the Search Window

From the **Options** menu, use the tabs on the **Settings** window to set up name and table formats, and manage the behavior of the **Search** window.

When you change settings for the window, whether it's in appearance or behavior, from the **Options** menu, you can use the **Save Settings** feature to save your changes. You can also **Clear Settings** to return to the default window setting.

Set up Name Formats

To determine the format of how you would like names to appear on the **Search** window, select **Options** from the **Search** window toolbar. From the **Settings** window (figure 4), select the **Name Formats** tab (figure 4).

Use the drop-down list under **Format** to select a specific format for the name to appear.
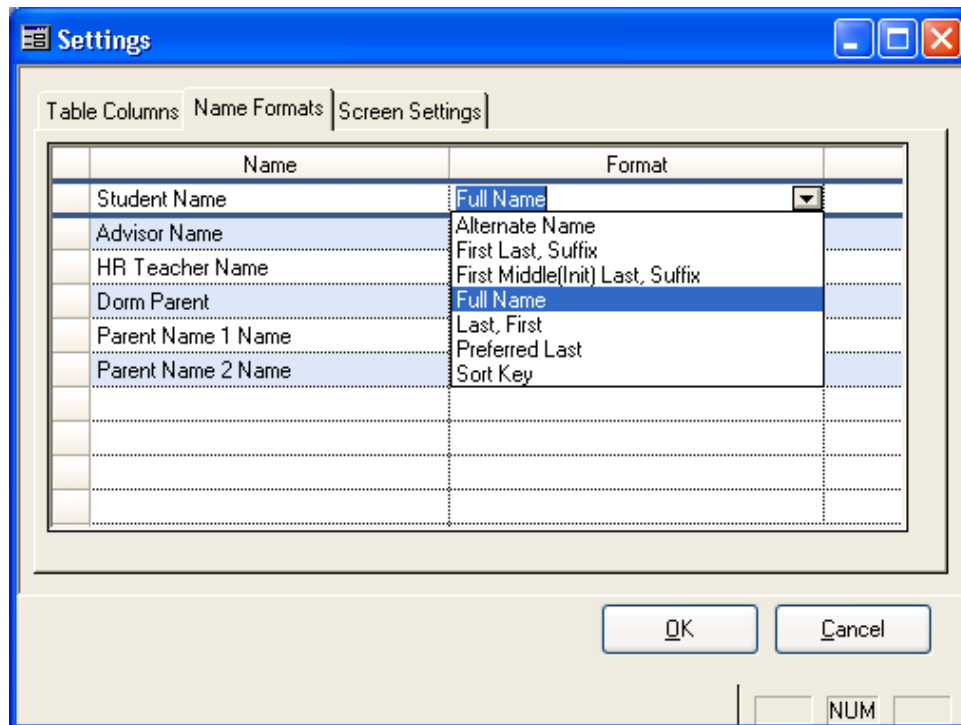
FIGURE 4.   Settings, Name Format

Note: Depending on the application you are running, the **Name Formats** tab may not be available. Some applications have more formatting options, others may have fewer, depending on the needs of the application.

Set up Behavior of the Search Window

To manage the behavior of the **Search** window, select the ***Screen Settings*** tab (figure 5).
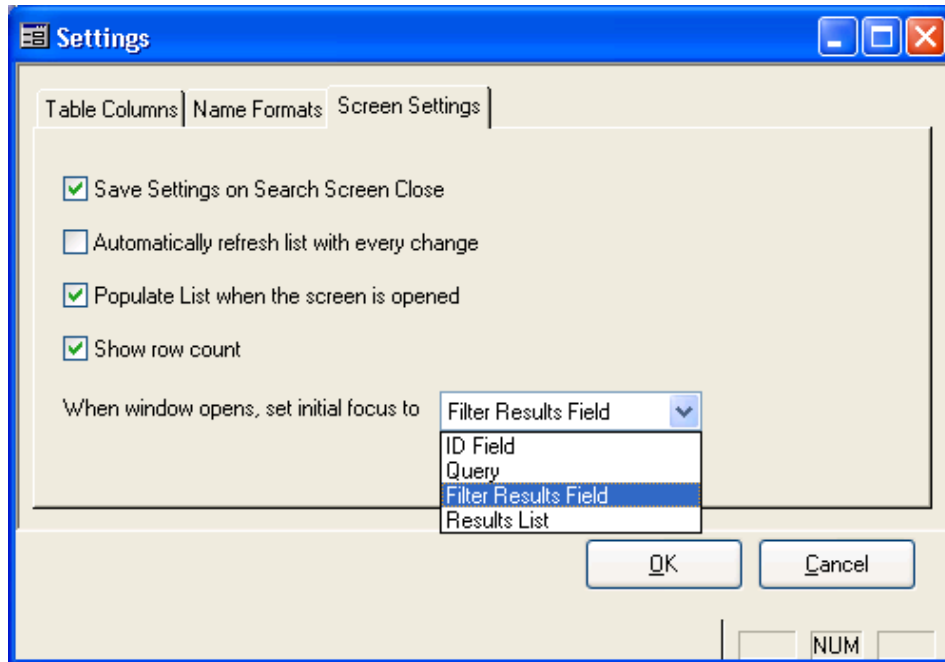
FIGURE 5. Settings, Screen Settings

If you check **Save Settings on Search Screen Close**, all of your window settings automatically save when you close the window. This includes columns, filter criteria, size and the position of the **Search** window.

If you check **Automatically refresh list with every change**, the search results window refreshes every time you change your filter criteria. If this box is unchecked, you will need to click **Refresh** or press **Enter** to refresh the **Search** results window.

If you check **Populate List when the screen is opened**, then the result list will populate when you open the **Search** window.

If you check **Show row count**, the number of rows of data appears on the bottom left-hand corner of the window.

When the **Search** window initially opens, using the drop-down list, you can select the field where the cursor appears. Options include: **Filter Results Field**, **ID Field**, **Filter Results Field**, or the **Results List**.

Set up Tables

To add or remove columns that appear in a table or used for a search, select the ***Table Columns*** tab (figure 6 and figure 7). Tables can contain as few or as many columns as determined by the selections made in this tab.

Directly from the **Search** window, you can move fields up or down so that columns appear in a specific order. You can export any table or all or some of the available columns and data.

FIGURE 6.   Settings, Table Columns (1 of 2)
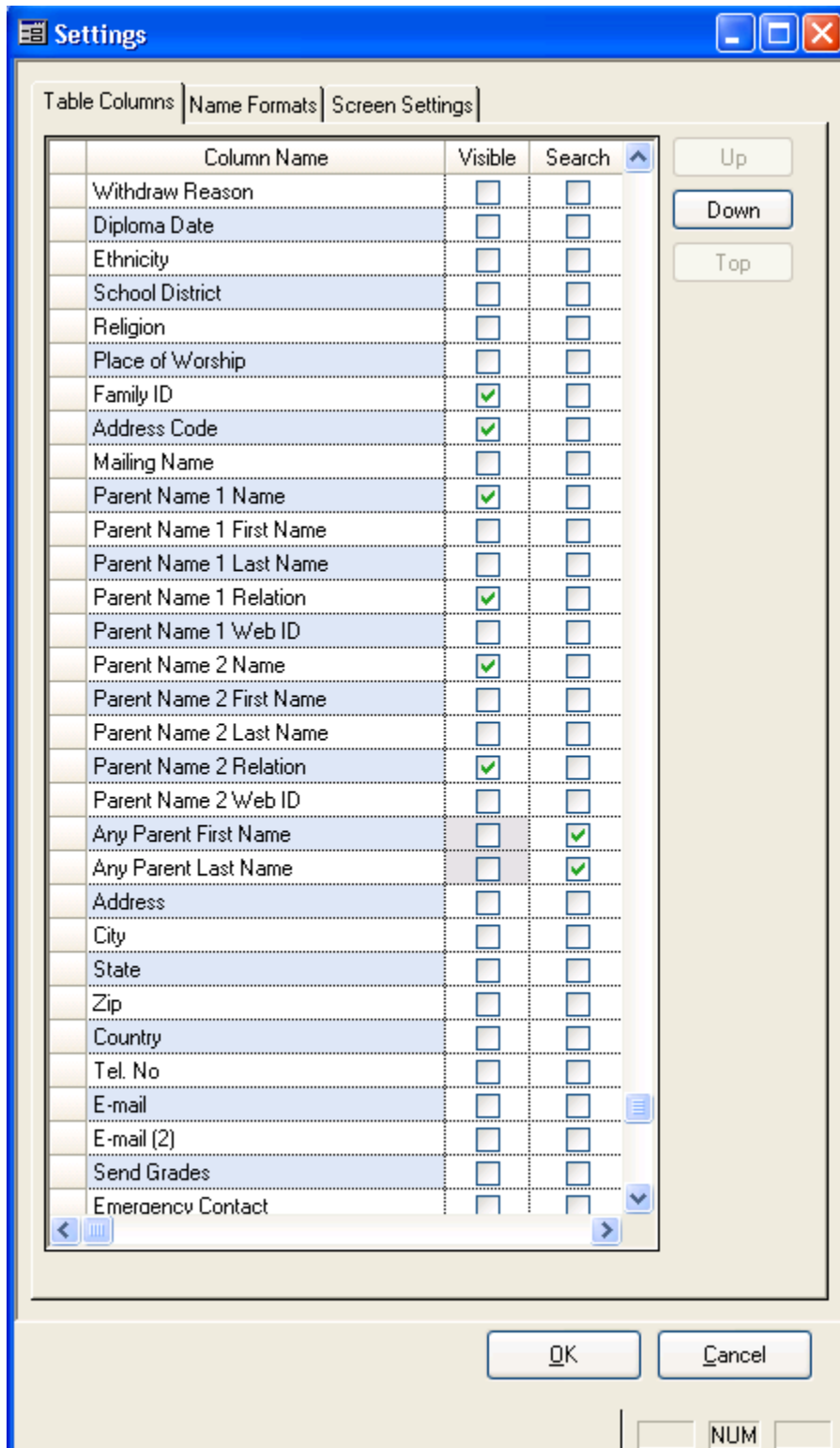
FIGURE 7. Settings, Table Columns (2 of 2)

Resize and Save Settings for the Search Window

You can resize the search window (figure 8) and save the changes with the **Save Settings** feature.

FIGURE 8. Expanded Search Window