Welcome to this Navigation training module, presented by Summer Issawi. Remember to contact the AIS Service Desk for support. This module will cover how to navigate in the AIS Document Viewer window. As you can see, we have logged in to AIS Document Viewer. You will see a left and right pane. The left pane is the enterprise view pane. The right hand pane is the document page, where you will see your reports. Everyone will have two folders. The topic folder and the report folder are on the left side. The topic folder is always collapsed and the report folder is always expanded. When I say documents and reports, I mean the same thing. If I were to open or expand the topic folder, it shows its contents. I can also collapse it. You will notice a typical window structure for collapsing and expanding folders. I will go ahead and open one for the reports by double clicking it. Notice the reports start with XX. Your reports will not start with XX. These are samples and for training purposes only. Notice a banner on top of the report. To see the report, I can double click on A11111 to see Donald Duck’s report. This is one way to open a report. You can navigate the file system and find the name, date, and how the report is indexed (filed). The bottom right tells you how many pages are in a given report. To close the report, I can click the exit icon in the toolbar. Another way to locate a report is by using the locate icon. I will close Document Viewer to keep the system open and to find things in the enterprise view pane. I am going to highlight XX Bills and then go up to click Locate. A dialog box opens with that info pre-populated since I selected XX Bills already. If I want to look up a particular version of a report that was run and I want to look up Donald Duck. I can type in 111 and the date and then locate and it will find the area where we can find that report. It highlights the bills for A11111. It won’t open it, just highlight it. So I can double click to open that report. So you can find reports manually or by clicking the Locate icon. I will click the Exit icon in the toolbar. This Enterprise View Pane will open many areas when searching. I am going to collapse the folders to make it a bit cleaner. The levels underneath the reports folders will show you all of the dates that the reports last ran. The version ID is a section ID. Section ID and indexing mean the same thing, pretty much, like how are the reports filed here (mail code, Zpid, social security, etc). You may notice blue arrows when we open XX Bills. Document Viewer shows a blue arrow if it cannot show all of the information at once. The expand icon by the blue arrow will show more of the areas. Going to XX Ledger and September 23, this is filed by account number. When I scroll down a blue arrow points down letting me know that there is more information. When I click the blue arrow, another 50 reports will show up. With this example, I only had a few more. I can collapse that to keep the system active, since it is secure. Another thing about Locate, is that there is Quick Open. On the toolbar on the top left, I can click Quick Open. Therefore, if I click XXGrades and then Quick Open, I get the first page of the first version of that selected report. My first page happens to be a banner page. Some reports are viewed in text mode and some are image reports. A bill for Donald Duck, the image report, has some sort of graphical look to it (graphs, logo, etc). I can close that and show you XXLedger 2, which is an example of a text report. You can see the difference in that these reports have no graphics and are green and white striped with text only. The banner page matches. The importance in image and text reports is to know which type of report you want to download. I can close, exit, and then go to the topic folder. The topic folder expands to show categories of reports. I can look at XXpid and see several reports. Looking at Donald Duck, we can look at some specific information, like grades, transcripts, etc. A11111 is attached to many different reports, as you can see. The topic folder is a way to have all of the reports on a certain ID or
account number to see what reports are there. In your office, you might not have anything under the topic folder, so you would not have anything to worry about. I can close out of this report. Often we’ve found that people cannot find the Locate icon. Be reminded you can click a report and then click the Locate icon to automatically fill in the field name. You can type a shorter or longer version of the month. Please do not continue to click if you can tell the system is running, as it may take a bit of time. When a report finally pops up, it has its own toolbar. The status bar is at the bottom. I can scroll down but to look at the second page, I need to click the next page icon at the top of the report to see the second page. I can go back to pg. 1, by clicking Go To Previous Page. In our features module, we will talk about getting to specific pages. This completes our module for navigating in AIS Document Viewer. I can close this report and collapse the icons on the left. We hope this information was helpful to you. This concludes the Navigation tutorial, thank you.