

Getting Started in iSIS:

Access iSIS through your internet browser.

- Open your internet browser.
- Enter <http://go.tufts.edu/isis>
- Enter your Tufts user ID and password.
- The iSIS Home Page will appear.

Recognizing Universal Navigation Elements:

The Universal Navigation Header at the top of every iSIS page contains the following links:

- **Home** – Click here to return to the Home page.
- **Add to Favorites** – Click here to add the current page to your Favorites list. Once added, Favorites are maintained under the **My Favorites** folder in the menu pagelet.
- **Sign Out** – Click here to sign out of iSIS.

Below the Universal Navigation Header is the Pagebar. The Pagebar is a series of links and buttons, which may include the following links:

- **Personalize Page** – Click here to control the initial display of the current page.
- **Help** – Click here to open the online PeopleBooks help for the specific transaction page that is displayed. You can also view the related UPK tutorial content from this link.
- **New Window** – Click here to open the current Component page in a new browser window.
- **HTTP** – Click here to copy the current page URL to the clipboard.

Getting Around iSIS:

Navigational Features - iSIS uses a **menu pagelet**, located on the left side of the Home page, for use navigating to various application pages. You can expand and collapse the topics (folders) in the menu pagelet by clicking on the triangle to the left of the topic.

Alternatively, you can click on the topic link to open a navigation page. Navigation pages provide intuitive access to pages needed to complete your business processes.

Note that as you navigate through the folders and pages, a menu of “breadcrumbs” will appear at the top of the page. Each breadcrumb level is separated by an angled brace (>) and is a clickable link, enabling you to navigate directly back to a specific level.

Components - To enter data in iSIS, you first access a component. **Components** consist of several pages within the same window. Usually these are **pages** that are related and need to be completed in succession. To move between the pages, you can select the folder tabs, press the corresponding access key, or click the **links** at the bottom of each page.

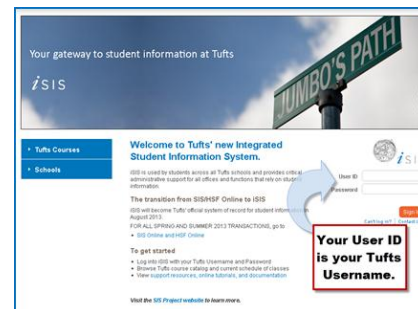
Search and Look Up Features in iSIS:

Search Pages - There are two types of search pages: basic and advanced. The options on the advanced search page enable you to narrow your search by entering values in multiple criteria fields. When you select a page, iSIS typically displays an advanced search page on the **Find an Existing Value** tab. You can also click on the **Add a New Value** tab to add a new row of data to the table instead of looking up existing information.

Look Up Icons - Some fields in Search pages and Transaction pages have a magnifying glass icon next to the field. This icon opens a Look Up Pop-Up Window to help you to find a valid value to enter in that field.

Search Results - In an advanced search, all columns in the Search Results list contain links. These links will access the selected search result. While looking at the selected search result detail page, Search List Navigation buttons are available to aid your search. The Search List Navigation buttons are as follows:

- **Previous in List** – Click here to view the Search result immediate before the search result being viewed.
- **Next in List** – Click here to view the Search result immediate after the search result being viewed.
- **Return to Search** – Click here to return to the list of search results.



Using Saved Searches - On advanced search pages, you have the option to save specific search criteria that is used often. After entering the appropriate search criteria, simply click on the Save Search Criteria link. The Save Search As page will appear. In the Name of Search Field, enter a name to help you identify the search and click on the Save button.

The next time you come to this search page you can call up the criteria without having to enter it manually by selecting the saved search from the Use Saved Search drop-down that will appear. Note that the saved search is available for use in all search pages that use the same search record.

Search Page Operators - Operators enable you to conduct a search on limited amounts of information. Available Operators are as follows:

- begins with
- contains
- =
- not=
- <
- <=
- >
- Between
- in

Using Wildcards - A Wildcard is a special symbol that stands for one or more characters in a search parameter. Using Wildcards enables you to select records when you do not know the full name of the search parameter or if you want to match multiple records. Note that Wildcards only work with **begins with** and **contains** search Operators. iSIS Wildcard features are as follows:

- % (percent sign) – Match one or more characters.
- _ (underscore) – Match any single character.
- \ (backslash) – Escape character - don't treat the next character as a Wildcard.

Using the Find Feature - If a search yields a large number of results, it may be useful to use the Find function. To use the find function, press [Ctrl + F]. A Find Field will appear at the bottom of the page. Enter the desired information, as you type, the first occurrence of the entered information is highlighted. Click on the Next button to highlight the next instance of the information.

Note that if the search results were on more than one page, it will be necessary to select view all prior to using the Find function in order to search through all of the search results.

Adding and Updating Data in iSIS:

Action types are used to view and maintain data records. iSIS has four action types:

- **Add** – This action type creates a new record.
- **Update/Display** – This action type is used to access current data and any future rows.
- **Include History** – This action type is used to access all historical, current, and future rows.
- **Correct History** – This action type is used to make adjustments to errors in the record. Not all users have access to the correction action type.

Categories of Effective Dated Rows:

iSIS uses effective dated-rows to retain historical data, view data changes over time, and store future data. There are three categories of effective-dated rows:

- **Current** – The current row displays the most current information.
- **Future** – Future rows allow you to enter transactions with a future date and file paperwork as soon as it is received to avoid potential loss of records.
- **History** – History rows allow you to maintain an accurate online history of data transactions.