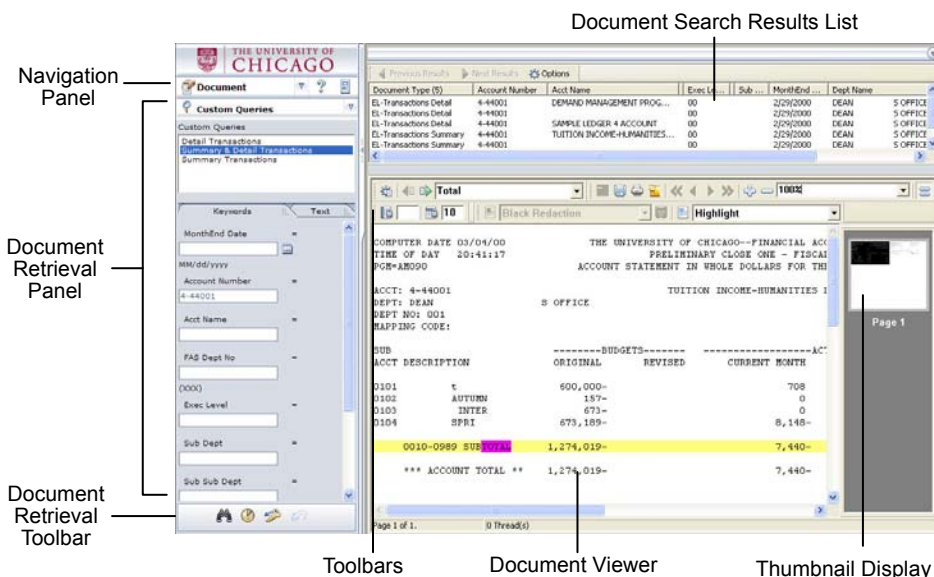


Web Client eLedgers Workspace



The **Navigation Panel** allows you to switch between different sections of eledgers. Use the **Document Retrieval Panel** to do basic searches for eledgers. Use the **Document Retrieval Toolbar** for more advanced searches. The **Document Search Results List** will show eledgers that met your search criteria. The **Document Viewer** area shows a selected eledger, while the **Thumbnail Display** highlights the portion of the eledger that is currently displayed. Use the **Toolbars** for easy access to commands to work with the eledger in the Document Viewer area.

Search for eledgers

Custom Queries are an effective way to search for eledgers. With Custom Queries you can use keywords or text strings to search for eledgers.

To use Custom Queries:

1. In the Navigation Panel, under Document Type, select **Custom Queries**
2. Under Custom Queries, select the **type of eledger** you want to search for:
 - **Detail Transactions (AM91)**
 - **Summary Transactions (AM90)**
 - or **Summary & Detail Transactions**



To use Keywords:

1. Type **keyword search criteria** in the option fields
2. Click the **Binocular Icon**

To use Text Strings:

1. Type in the **Search String**, or the text you want to find on eledgers. (A vendor name, for example.)
2. Make any additional choices to limit search
3. Click the **Binocular Icon**

This screenshot shows the search interface with two panels. The left panel is for 'Keywords' and contains fields for 'Month/End Date', 'Account Number', 'Acct Name', 'FAS Dept No', 'Exec Level', 'Sub Dept', 'Sub Sub Dept', 'Dept Name', 'CNetID', and 'Real Name'. The right panel is for 'Text' search and contains a 'Search String' field and several checkboxes: 'Text' (selected), 'Number', 'Formatted Number', 'Case Sensitive', 'Whole Word Match', 'Wild Card Search', 'Create Report', and 'Report Description'.

What is eLedgers?

eLedgers is the application used to store and distribute The University's ledgers of record in a secure electronic environment. Electronic ledgers (eledgers) are available to all authorized FAS administrators.

When can I view my eledgers?

Generally, eledgers will be available five business days after the start of the following month. For more specific dates and information, visit the FAS calendar at: <http://event.uchicago.edu/fas/>

How do I access eLedgers?

With Internet Explorer :

1. Go to: <https://ariadne.uchicago.edu>
2. Type your **CNetID** and **Password** for credentials (it is case sensitive)
3. Select **ActiveX**
4. Click **Login**

NOTE: ActiveX may require a download and admin rights. Select **HTML Only** to use eLedgers with limited features.

With Firefox or Safari:

1. Go to <https://ariadne.uchicago.edu/JavaClient>
2. Type your **CNetID** and **Password** for credentials (not case sensitive)
3. Click **Login**

NOTE: Some features on Firefox and Safari are limited.

Document Retrieval Toolbar

-
- Click to start the a search
 - Displays a list of all the searches performed during the current session.
 - Clears keywords or text searches
 - Resets the entire Document Retrieval window.

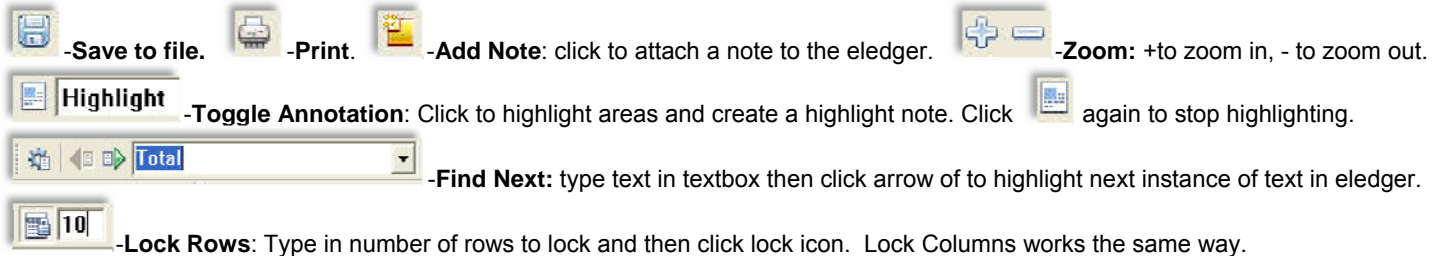
Notes

eLedger Navigation Tool bars

Toolbars give you easy access to commands so you can work with eledgers quickly. To view or hide toolbars, right click on an eledger in the document viewer area, select toolbars. Checked toolbars will be displayed, click on a toolbar name to check. Once displayed, you can move toolbars to your preferred order and hover your mouse over any button for a screen tip or explanation of the command.



Popular buttons include:



Custom Queries Options

More Search Options:

- **Change the numeric operator:** Click the = sign to change equal to: less/greater, less/greater than or equal to, and not equal (<, >, <=, >=, and <>).
- **Search Multiple Keyword entries:** To open second keyword place your cursor in the field you want to duplicate and press F6 on your keyboard (or, Double-click on the Keyword Type's name label).
- **Use And/Or operators:** With at least two keyword entries, the **And** button will appear, click the and button and you can toggle between and an or when you have more than one keyword entry. **And** returns eledgers that contain both keyword values entered. **Or** returns eledgers that contain either, or both of the keyword values entered.

Right Click Options

When viewing an eLedger you have the following right click options:

- **Keywords-** Select keywords to highlight specific information within the eledger
- **History-** Select history to see the history of the eledger Here you can see when and who made changes, or viewed the eledger
- **Notes-** Select notes to add or view notes Notes do not appear on the eledger, but are attached to the eledger
- **Print-** Select print to print the eledger from your computer
- **Send To-** Select Send To to email eledgers or save the document to your computer. To email to another eLedgers user select **Internal User**. If you are using Outlook and the ActiveX client, you can select **Mail Recipient** to email the eledger in Outlook. Select File to save your eledger to your personal computer
- **Toolbars-** Check or uncheck specific toolbars to show or hide tool bars
- **Navigate-** Switch between pages of your eledger with Navigate
- **Scale-** change the viewing scale (zoom in or out)
- **Process-** Change the orientation (rotate right/left or flip vertically/horizontally)
- **Collaboration-** This feature is not generally used in eLedgers

The Proxy Screen

A **Proxy** is a person who has access to your FAS eLedgers. You can request Proxy access for any FAS account that you have access to.

To give proxy access to an account:

1. **Create an OnBase account.** In the Document Retrieval Panel, select new forms → New OnBase Account Access (Eforms) → fill out the form and Submit. Wait 2 business days before the next step.
2. **Request Proxy access.** In the Document Retrieval Panel, select new forms → Requests: Proxy Access to Ledgers (Eforms) → fill out the form and Submit.

NOTE: You can give proxy access at the level of your access. For example, if you have exec or department level access, you can have a proxy for your exec or department level access. If you are an administrator on an account, you can have a proxy for the account that you administer.

Notes