Updated Account Code Filter — User Interface

APTAWEB-10364

Introduction

A new filtering option was added to **All Grids** in AptaFund that **Display Account Codes**. This option is part of the regular filter icon. There are now two options:

- Use the Account Code Assistant to type in the account code string and select it from a list of account codes.
- Use the Account Code Expression to search for a group of Account Codes based on the elements and operators chosen.

Account Code Filter

You will click on the **Filter** icon. All the filter rows are available. When you click on the **Account Code** row, you will get this new box.

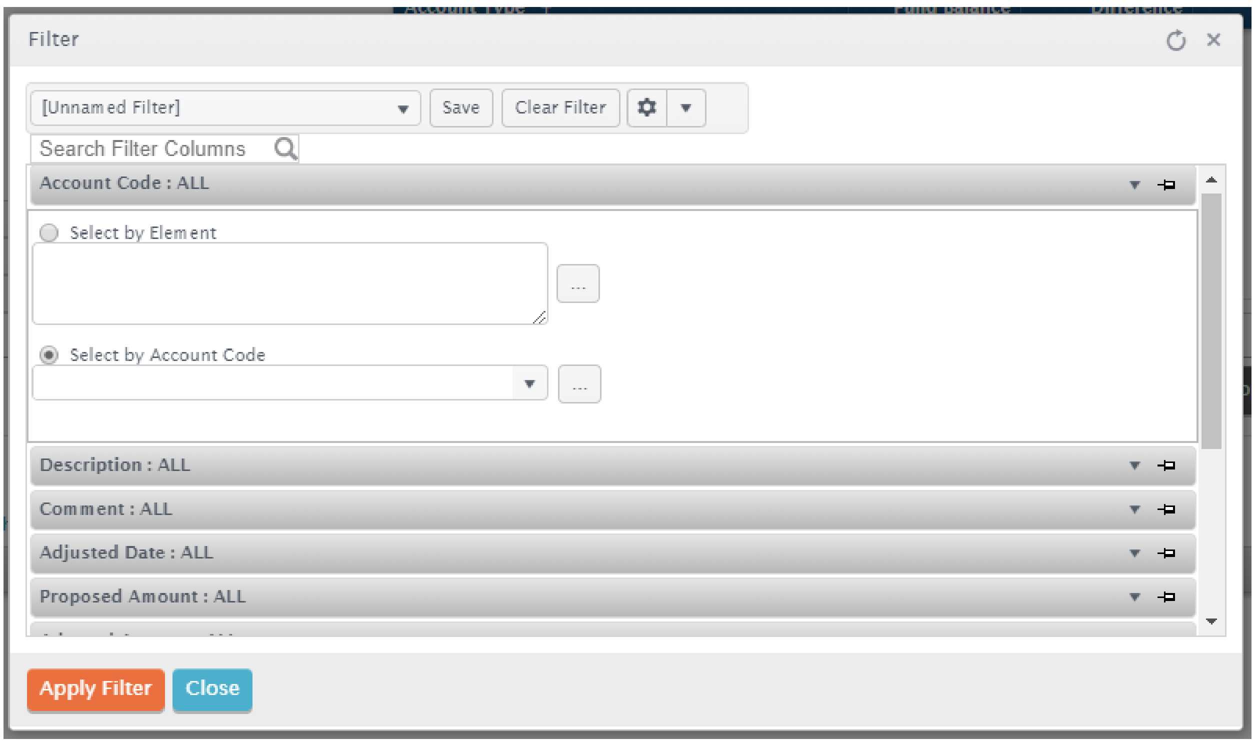

Figure 1: Select by Account Code Option

Select by Account Code

The **Select by Account Code** option works like the normal account code field. You may start typing an **Account Code**, type an **Element** of the **Account Code** or part of the **Account Code Description**. A drop-down list will help you find your choice.

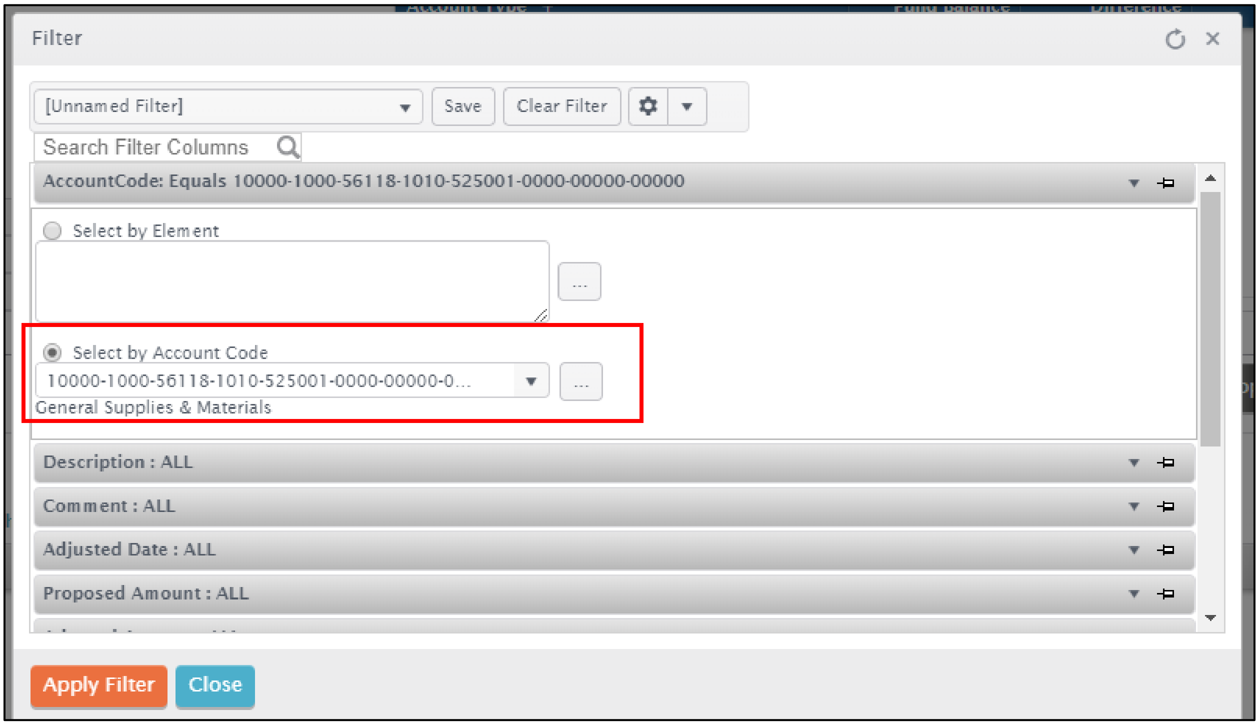

Figure 2: Select by Account Code Option

Select by Element

This is a new option. You will click on the radio button to choose the **Select by Element** option. Click the ellipsis button — the square with 3 dots.

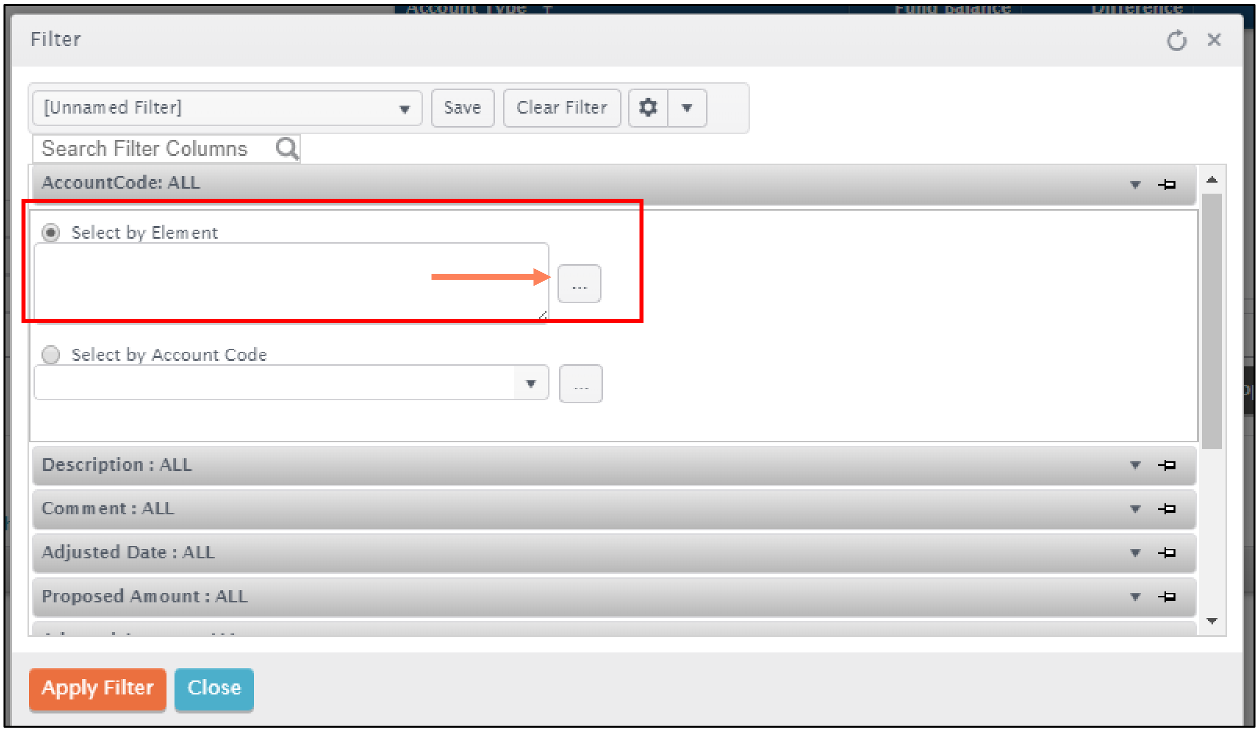

Figure 3: Select by Element Option

Once you click on the ellipsis button the **Account Code Expression Assistant** pop-up window will open.

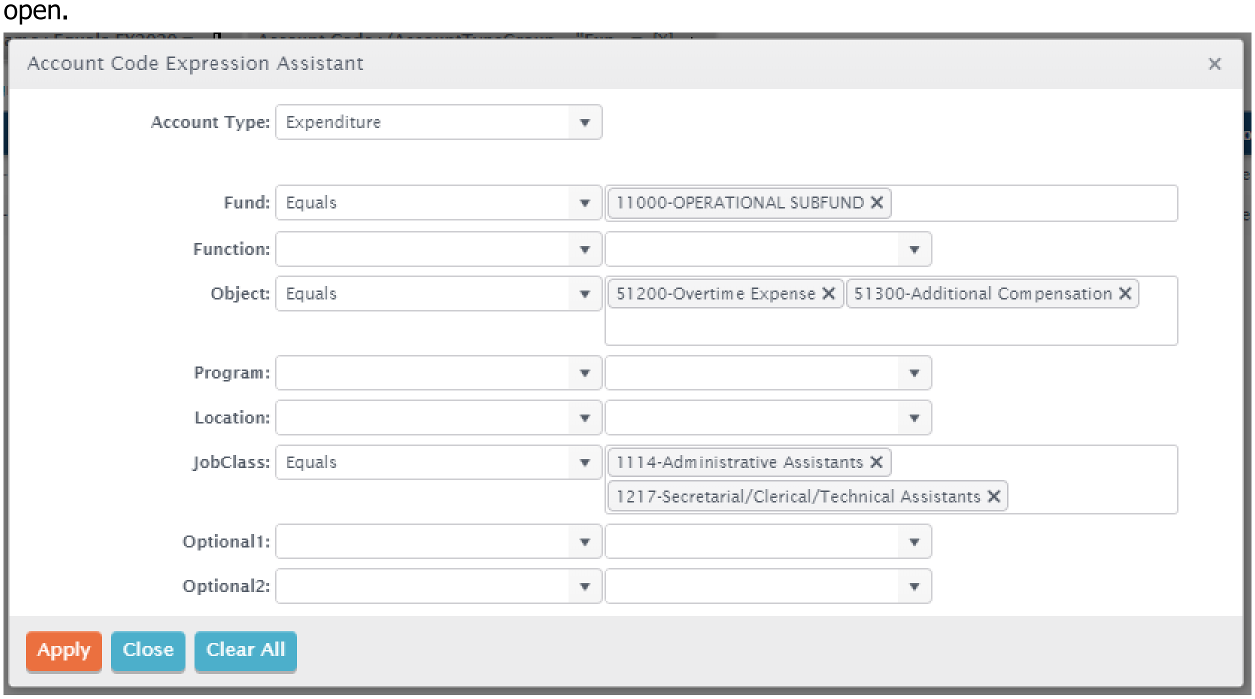

Figure 4: Account Code Expression Assistant

When the box opens you will choose your Account type. Then choose any Element. The first field will be your **Operator** option**s.** The next field you will choose one or more **Elements**. Once you have your selection click the **Apply** button.

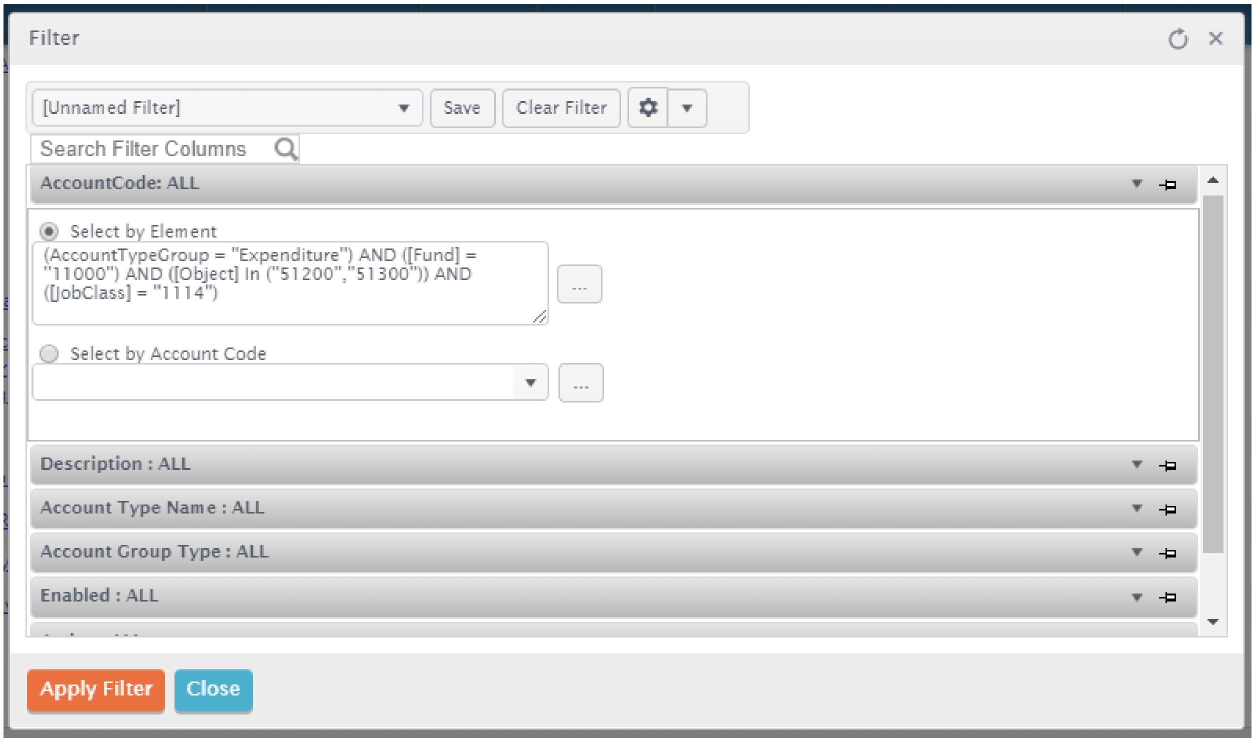

Figure 5: Select by Element Filter Expression

You will see your **Filter Expression**. You can modify it by clicking the **Ellipsis** button and changing any elements. To see the accounts filtered click the Apply Filter button. The Grid you are filtering will now show you your selection.

Available Screens:

Asset Items Data View

Budget Development

Budget Management

Cash Receipts Detail View

Cash Receipts Items

Chart of Accounts

Employee Job

Employee Job Allocation

General Ledger Normal

GL Compress Transaction View

Master Position Data view

Payroll Jobs Addenda View

PO Detail for Invoices

Position Allocation History

Position Management Data View

My Requisition Data View

Purchase Requisition Data view

Vendor Invoice Detail

Vendor Management