

Index Discovery (Who & What)

The Index Discovery method can be used when the who (name, payee) and what (timesheet or expense) are known.

Document Index View

The screenshot shows the 'Documents' tab selected in the top navigation bar. Below the navigation, the 'View All' section has tabs for 'Timesheets', 'Expenses', and 'Plan Documents'. The 'Timesheets' tab is active. A dropdown menu for 'Payee' is set to 'All' with a 'Filter' button. A table lists 12 items with columns for NUMBER, DATES, NAME, TITLE, HOURS, and TOTAL. The fourth row is highlighted. At the bottom, a pagination control shows '1 of 13' and a total count of '124 items'.

NUMBER	DATES	NAME	TITLE	HOURS	TOTAL
453088	07/08/2019 - 07/20/2019	[REDACTED]	COMHAB	25.50	\$748.65
449889	06/24/2019 - 07/06/2019	[REDACTED]	COMHAB	28.00	\$798.56
445876	06/10/2019 - 06/18/2019	[REDACTED]	COMHAB	15.50	\$442.06
450293	06/08/2019 - 07/06/2019	[REDACTED]	COMHAB	36.50	\$1,040.98
445953	06/01/2019 - 06/01/2019	[REDACTED]	COMHAB	11.00	\$272.80
441401	05/27/2019 - 06/04/2019	[REDACTED]	COMHAB	15.50	\$299.46
437968	05/13/2019 - 05/21/2019	[REDACTED]	COMHAB	15.50	\$442.06
434399	05/05/2019 - 05/19/2019	[REDACTED]	COMHAB	14.00	\$399.28
433513	04/29/2019 - 05/07/2019	[REDACTED]	COMHAB	11.50	\$327.98
429654	04/15/2019 - 04/23/2019	[REDACTED]	COMHAB	13.50	\$385.02

1. Navigate to the Document Index page by clicking the Documents tab across the top.
2. Switch between Timesheets and Expenses using the tabs.
3. Use the dropdown to filter timesheets or expenses by Payee.
*Click Filter to filter the list after making a dropdown selection.
4. Select an item to view its Item Detail page.
5. Timesheets and expenses are broken down into pages. Use the navigation arrows to move between pages in the list.
6. Notice the total count of items. This is specific to the active tab.
 - In the example shown, there are 124 timesheets and 226 expenses. Since the Timesheets tab is active, 124 is displayed.

🔄Revision #3

★Created 19 November 2020 23:07:24 by Admin

✎Updated 9 February 2023 17:10:30 by Admin