

Enterprise - Tips for Navigating Through the UI

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Whether you are a new user or a seasoned Enterprise expert, this document will show users some of the best tips for navigating through the system.

This article includes:

1. Record Organization: Look to the left!
2. Icons Overview
3. Utilizing Navigation and History
4. Right Click: The Hidden Menu
5. Keyboard Shortcuts

Record Organization

In Enterprise, our list of records and menu navigation all starts on the left side of the screen. If you are ever lost in the system and aren't sure what you are looking for, just look to the left.

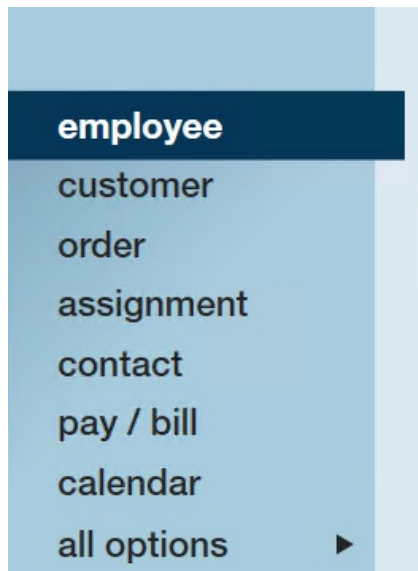
The screenshot displays the Enterprise user interface. At the top, a blue header bar shows the user's name, 'Lorelai "Leah" Woodbury', along with contact information and system notifications like 'Lunch Today' and 'Pay update confirm'. Below the header, a navigation tree on the left side is highlighted with a red box, showing categories such as 'visifile', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', and 'calendar'. The main content area is divided into several sections: 'employee snapshot' with fields for Name, Email Address, and Hire Status; 'messages' with a table of recent messages; 'assignments' with a table of job assignments; and 'phone/email' with contact information. A large red arrow points from the 'employee' category in the navigation tree to the 'employee snapshot' section, illustrating the concept of record organization.

Date	Activity	Message	Rep	Contact
9/15/2020	Order Candidate	date -- EZ Manufacturing Comments:	jeff.sassano	Irwin, Steve (EZ
9/11/2020	Refused	declined worked. for central perk warehouse.	rachel.langehough	
9/11/2020	Unemployment Claim		rachel.langehough	
8/5/2020	Unemployment Claim		rachel.langehough	
7/2/2020	Check Correction Void		rachel.langehough	

Title	Customer	Code	Start	End	Bill	Pay	Dept
Order Puller	Hartford Party Re...	NS	7/5/2020	9/1/2020	\$19.50	\$13.00	Primary
Order Puller	Hartford Party Re...	RC	1/30/2020	6/30/2020	\$18.00	\$12.00	Primary
Order Puller	Central Perk Pack...	CO	5/25/2020	6/9/2020	\$19.50	\$13.00	Primary
General Laborer	Buy N Large	G	10/9/2019	10/25/2019	\$32.00	\$20.00	Primary
General Laborer	Buy N Large	CO	6/12/2018	9/27/2019	\$40.00	\$25.00	Primary

Code
Computer Operator
Data Entry
ENG-Industrial Engineer
Industry Engineering
Mechanic
Mechanical Engineer

The type of record you are looking at will be highlighted if you have them in your navigation tree. Check out [Enterprise Record Types](#) for more information on the different types of records in our system.

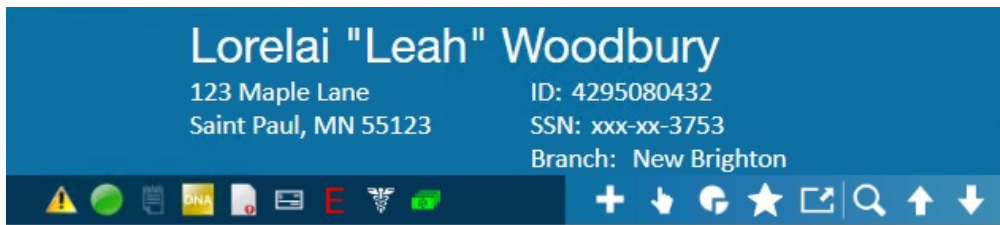


Did you know you can also customize your Navigation Tree? Check out [How to Customize Your Navigation Tree](#) for step by step instructions.

If you look up from the navigation tree you will see a list of all the sections available on the record you are currently looking at. Think of this like a table of contents for all the information that can be held on this record. The section you are currently looking at will be highlighted:

Date	Action	Message
9/15/2020	Order Candidate	Candic
9/11/2020	Refused	declin
9/11/2020	Unemployment Claim	
8/5/2020	Unemployment Claim	
7/2/2020	Check Correction Void	

If you keep looking up, in your upper left corner will be the name of the record and some basic information including the record ID. This area is called the record Avatar.



Looking to learn more about the Avatar section? Check out:

- [Enterprise - Employee Record Navigation and Basics](#)
- [Enterprise - Creating Customer Records & Customer Record Avatars](#)
- [Enterprise - Contact Avatar Area and Actions Menu](#)
- [Enterprise - The Order Avatar & Icons](#)

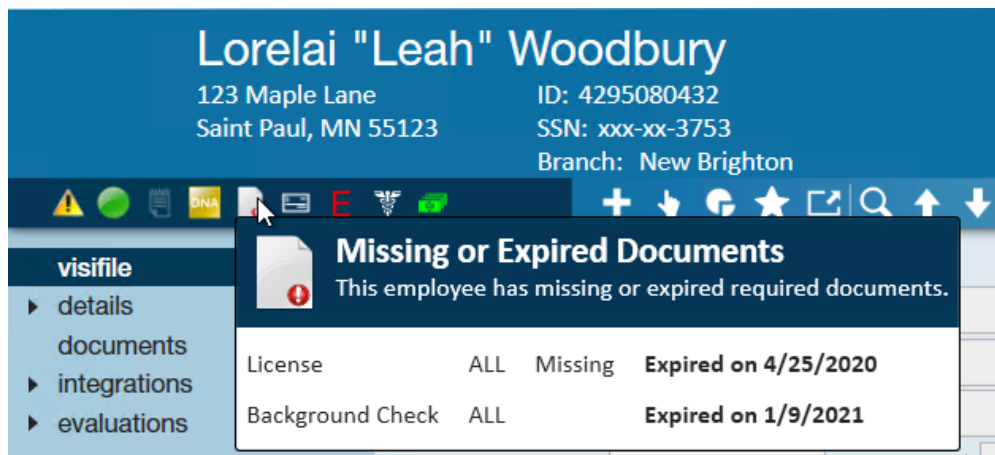
This principle follows through all of Enterprise - no matter where you are in the system you can always look to left to determine what record you are currently viewing.

Icons

Icons can be found in many different places in Enterprise. They can provide you with additional information, give you additional options, or present you with shortcuts to key features. It can be easy to overlook these icons, but these small options can have a big impact on how you navigate through the system.

Providing you with Information

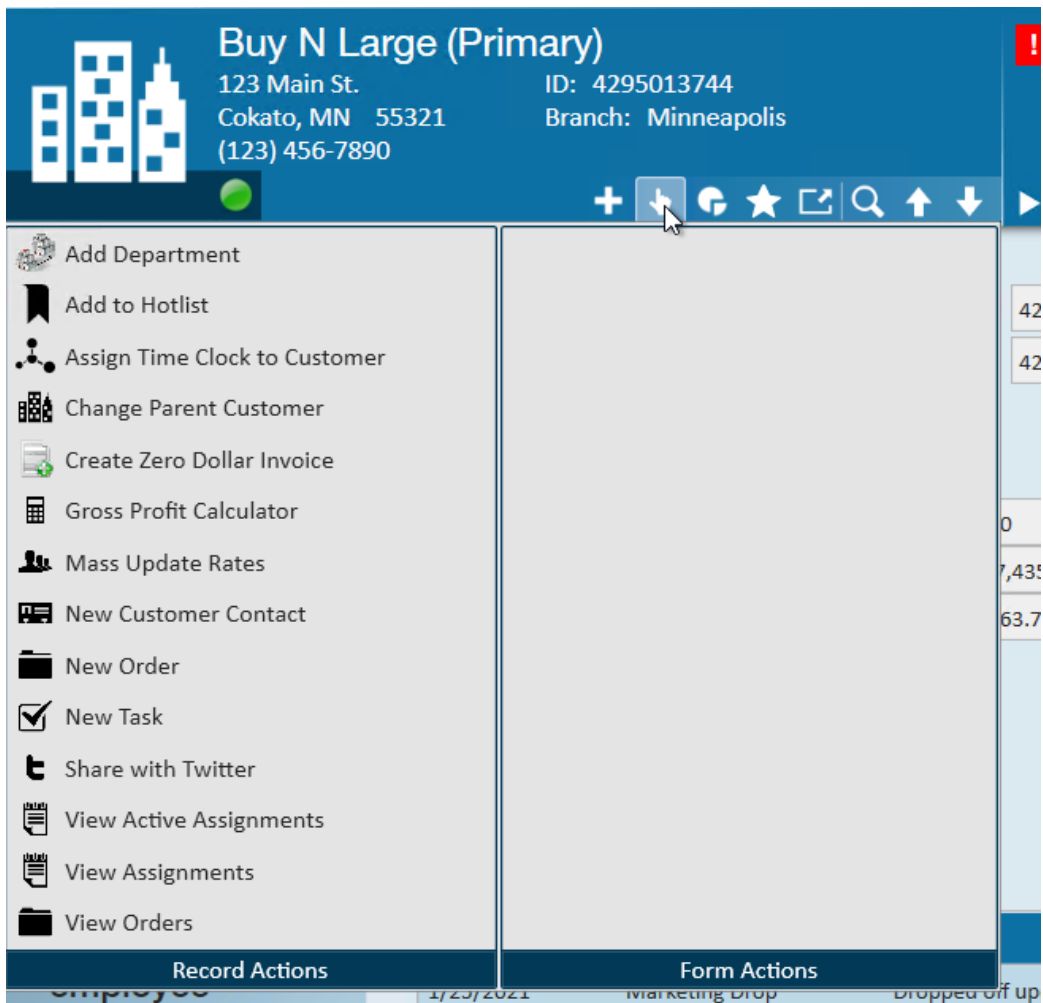
Avatar icons provide you with quick key information on the employee's record. We recommend hovering over any icon you aren't sure about for more information.



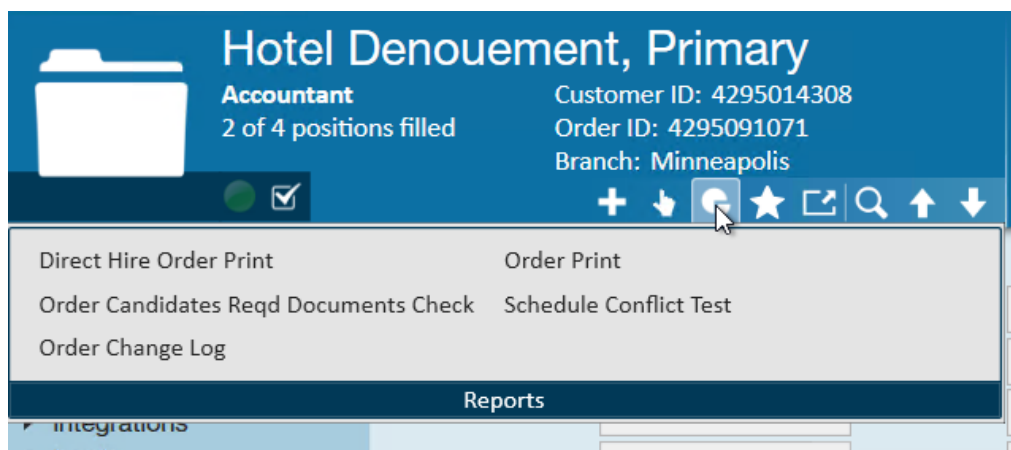
Check out [Enterprise - Employee Record Navigation and Basics](#) for more information.

Giving you Additional Functionality

Check out the Actions icon at the top of a record to see a list of additional actions you can take with the current record you are viewing:



Anywhere you see the pie chart icon, you can quickly pull a report related to what you are already looking at. It's often found in the Avatar section of different record types.

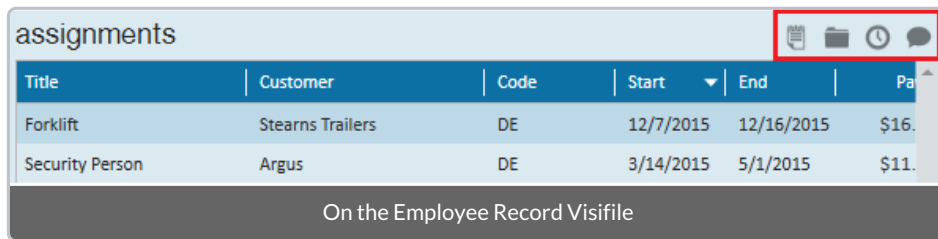


Shortcut Options

So often in Enterprise we run into times when records are *related* to another. For example, contacts are typically associated with a customer record and assignment records are linked to orders and employees.

There are various jump buttons to quickly jump from the record you are viewing to a related one.

Sometimes the shortcut icons look like the record type they would direct you to. Like on the employee visifile, if you select an assignment you can quickly navigate to the assignment or order record by clicking the icon in the upper right.

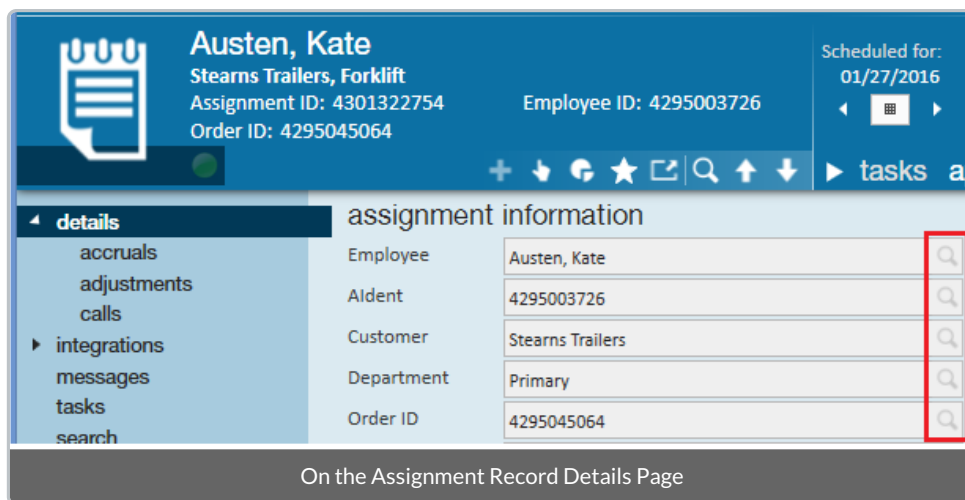


The screenshot shows a table titled 'assignments' with columns: Title, Customer, Code, Start, End, and Pa. The table contains two rows: 'Forklift' for 'Stearns Trailers' and 'Security Person' for 'Argus'. A red box highlights four icons in the top right corner: a magnifying glass, a folder, a clock, and a speech bubble.

Title	Customer	Code	Start	End	Pa
Forklift	Stearns Trailers	DE	12/7/2015	12/16/2015	\$16.
Security Person	Argus	DE	3/14/2015	5/1/2015	\$11.

On the Employee Record Visifile

The magnifying glass can mean search in our system but it can also mean look up to quickly jump to a record. For example on the assignment details of an employee record there will be magnifying glass icons next to each related record (employee, customer, etc.). When you click on the magnifying glass you will be brought directly to that record:



The screenshot shows the 'assignment information' section of an employee record for 'Austen, Kate'. The table lists fields: Employee, AIdent, Customer, Department, and Order ID. Each field has a magnifying glass icon to its right, which is highlighted by a red box. The page also shows a sidebar with navigation options like 'accruals', 'adjustments', 'calls', 'integrations', 'messages', 'tasks', and 'search'.

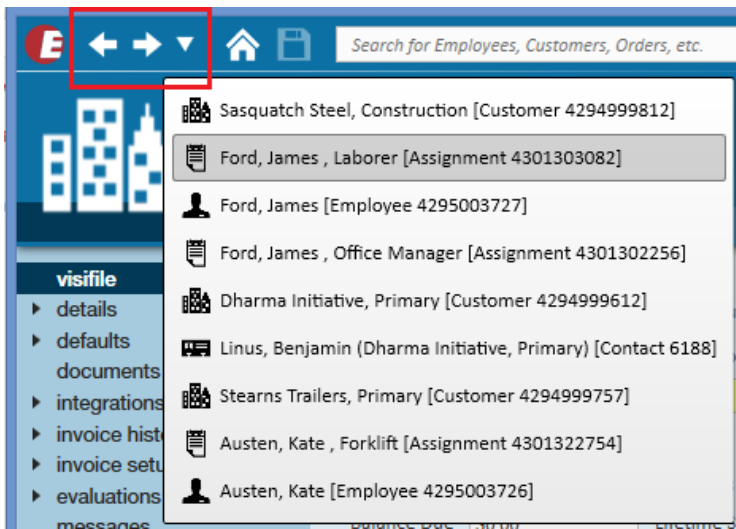
assignment information	
Employee	Austen, Kate
AIdent	4295003726
Customer	Stearns Trailers
Department	Primary
Order ID	4295045064

On the Assignment Record Details Page

Navigation and History

There are navigation buttons available in the upper left of your Enterprise window. These three icons are so helpful for navigating through Enterprise they get a special mention.

Whether you are in a sales, recruiter, or payroll role one thing you have in common is that you work in a fast paced industry. In just one day you could talk to 50 people - so what's an easy way to jump between all these people? The navigate back icon, navigate forward icon, and history drop-down:

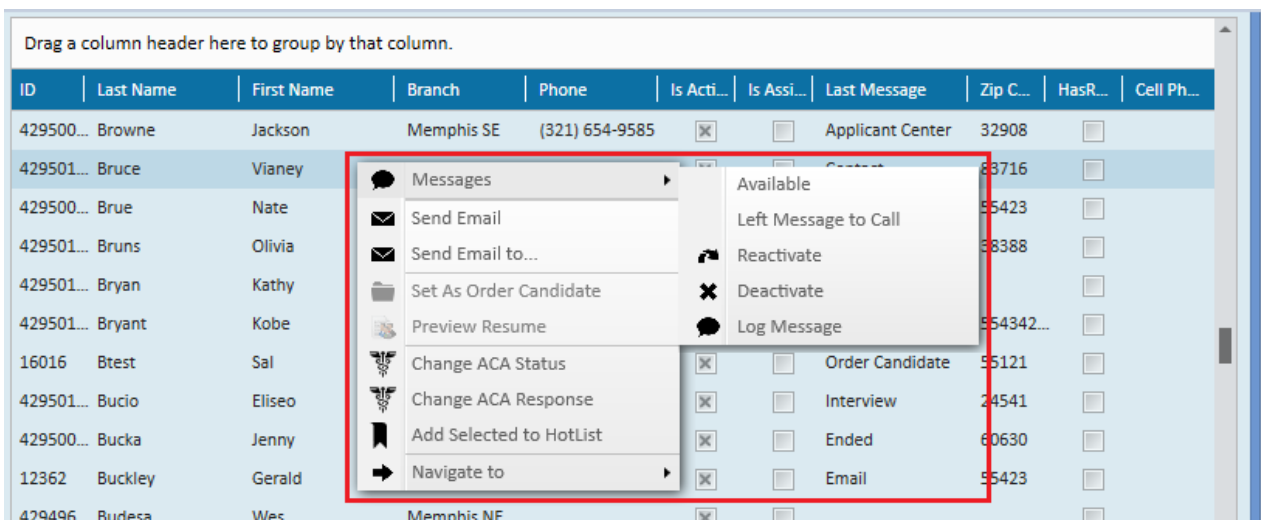


Use these icons in the same fashion as you would in any internet browser to easily jump back to a record if an employee or contact returns a voicemail.

Right Click Options

Anytime you come across a table in Enterprise (search results page, time entry dashboard, hot list, message list, assignment list, etc.) you can essentially guarantee yourself that right-click functionality is available to you. Similar to icons, right-clicking an item within a table will open new options and shortcuts that were otherwise hidden from you.

For example, by right-clicking an employee from a search results page, the ability to log a message, email, text, add to hotlist, and more is now available:



Keyboard Shortcuts

Not a fan of the mouse? Use built in keyboard shortcuts to refresh pages, save records, change your hierarchy, navigate to different areas of the software, and to create entirely new records. One of my personal favorite

keyboard shortcuts is the combination of **Alt + I** which takes users directly to the time entry dashboard.

You can find Keyboard Shortcut list in the system by select the **E** button → keyboard shortcuts:

APPLICATION	
F1	Help
Ctrl + S	Save Record
F5	Refresh
Alt + B	Switch Branch

NAVIGATION	
Alt + Home	Home
F2	Customer Dashboard
Ctrl + 2	Customer Dashboard
F3	Order Dashboard
Ctrl + 3	Order Dashboard
F4	Assignment Dashboard
Ctrl + 4	Assignment Dashboard
F6	Employee Dashboard
Ctrl + 1	Employee Dashboard
Ctrl + 5	Contact Dashboard
Alt + T	Back Office Dashboard
Alt + I	Time Entry Dashboard
Ctrl + Shift + F	Internal Fees
Alt + F12	Calendar
Alt + R	Reports
Shift + Alt + 1	Resume Parser
Shift + Alt + R	Resume Parser

RECORD	
Alt + Left Arrow	Back
Alt + Right Arrow	Forward
Alt + 1	Add Employee
Alt + 2	Add Customer
Alt + 3	Add Order
Alt + 4	Add Assignment
Alt + 5	Add Contact
Alt + 6	Add Message

Check out [Keyboard Shortcuts](#) for a full list of shortcuts.

Related Articles