

This resource guides you through the process of navigating through the Compass Portal.

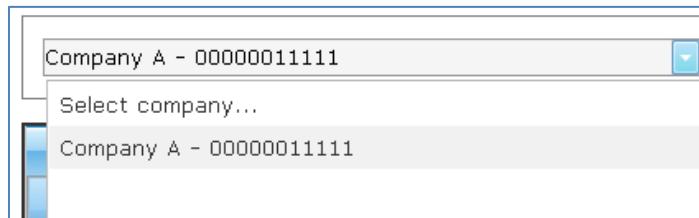
Compass Navigation

Page Navigation:

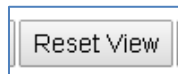
The Compass UT1, UT2, and UT3 data entry screens have a similar look and feel to Microsoft Excel.

The screenshot shows the Compass Portal interface. At the top left is the Compass logo and the text "UNIVERSITY LANDS THE UNIVERSITY of TEXAS SYSTEM". At the top right is a "Log Off" link and a "Press to Logoff" button. Below the logo is a navigation bar with a dropdown menu showing "Company Master - A1000019" and buttons for "Save", "Delete", "Add Row", "Validate", "Send", "Reverse/Rebook", "Reset View", "Show Hotkeys", and "Upload CSV". The main area is a grid titled "UT1 and UT2 Header (1)". The grid has columns for "Company Number", "Company Name", "Status", "Production Date", and "Product". The first row shows "1", "A1000019", "Company Master", "Incomplete", "11/2011", and "Oil". The second row shows "2", "A1000019", "Company Master", "Incomplete", "11/2011", and "Gas". The third row shows "3", "A1000019", "Company Master", "Incomplete", "12/2011", and "Oil". The fourth row shows "4", "A1000019", "Company Master", "Incomplete", "12/2011", and "Gas". The fifth row shows "5", "A1000019", "Company Master", "Incomplete", "01/2012", and "Oil". Below the grid are sections for "Property Report (2)", "Disposition (3) / Tract (4) / Purchaser (5)", and a "Navigation" sidebar. At the bottom, there is a footer with contact information and a "Reset View" button.

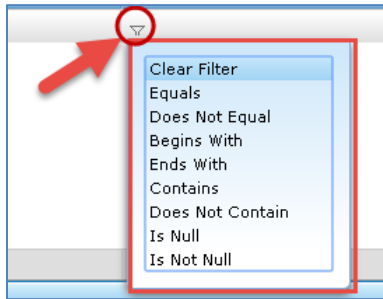
- The UT1 and UT2 Header Grid displays high-level Production Reporting data. The Header Grid has a “parent” relationship with the Property Grid. The Property Grid has a “parent” relationship to the Disposition, Tract, and Purchaser Grids. By selecting a Header record (row), the corresponding Property records display in the Property Grid. By selecting a Property record, the corresponding Disposition, Tract, and Purchaser Grids display.
- The Company drop-down list is used by Agents to select the Company for which they are reporting. For most users, this defaults to their own Company name.



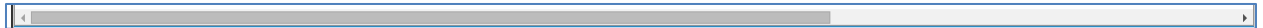
- User may re-order/move columns by selecting the column title and dragging the column. Clicking the “Reset View” button reverts to the default order of the columns.



- User may filter the data displayed in the grid by clicking the filter icon in any column heading. To filter, click the Filter icon and select the Filter Type using the drop-down.



- User may sort data in ascending or descending order by clicking most column heading. To sort a column, click directly on the field title.
- Users navigate within the screen/grid as they would in a spreadsheet. Use the TAB key, ENTER key, Page Up/Down keys, up/down arrows, and scroll-bars.



- User can return to the Landing Page by clicking the Compass logo in the top left-hand corner of each screen.

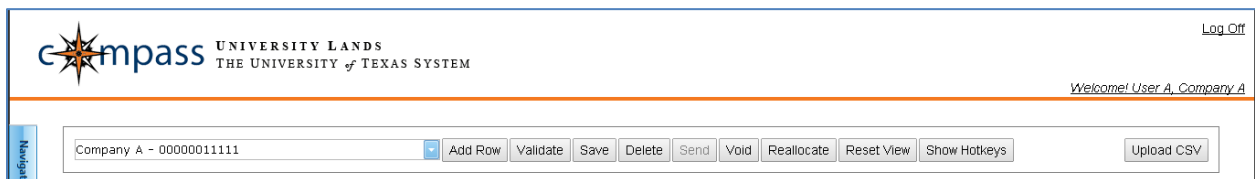


- There is a Logoff link in the top right-hand corner of every screen.



UT1 and UT2 Toolbar:

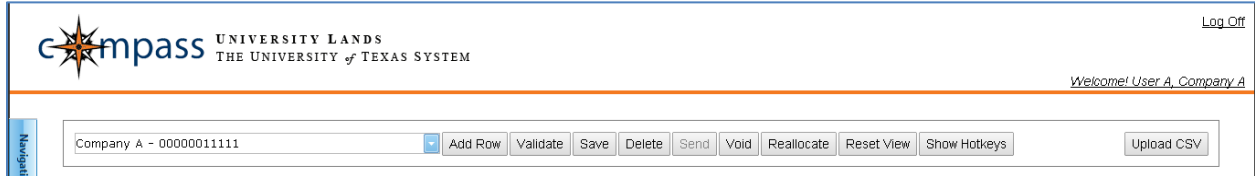
At the top of the UT1 and UT2 Reporting page, there is a row of buttons that support Compass' functionality. The following toolbar options are available:



Action	Description
Save	Commits the user's changes to the database
Delete	Allows a row in Saved or Validated status to be removed from the database
Add Row	Inserts a row for data entry into the selected grid
Validate	Triggers validation for all records in the grid
Send	Commits records in the Property Grid that are selected by an "x" in the check box to the UL Accounting System.
Reverse/Rebook	Creates a reversal record and a new rebook record for the user to edit
Reset View	Resets the view for all grids in the current screen
Show Hotkeys	Opens pop-up window that displays the shortcut key options
Upload CSV	Opens pop-up window to browse for and upload a CSV file

UT3 Toolbar:

At the top of the UT3 Page, there is a row of buttons that support Compass' functionality. The following toolbar options are available:



Action	Description
Add Row	Inserts a row for data entry into the selected grid
Validate	Triggers validation for all records in the grid
Save	Commits all user edits to the database
Delete	Deletes the selected header and all related Check Details records. Note: this option is not available if the record was already Sent to University Lands.
Send	Validates and submits the selected UT3 payment details to University Lands. Records in a Sent status are read-only.
Void	Reverses the UT3 details previously Sent to University Lands. <ul style="list-style-type: none">• This option is only available if a payment has not matched to the UT3.• Any un-sent records are deleted from the UT3.
Reallocate	Triggers the reallocation of payments. This button replaces the Send button in the event the user is reallocating prior payments between properties and/or production months.
Reset View	Restores the UT3 screen to the original template for column width and sequence.
Show Hotkeys	Pop-up window that displays shortcut key options
Upload CSV	Opens pop-up window to browse for and upload a CSV file

Shortcut Keys:

The following shortcut keys execute a specific function or command within the Compass Portal. If a shortcut has multiple keys, it is written with all keys required to perform the function:

Hotkey	Function
Delete	Removes the currently selected row from the data grid
Up/Down	Switch between rows within a grid
Tab	Switch to the next editable column within a grid
Shift + Tab	Switch to the previous editable column within a grid
Control + A	Add new row for selected grid (if applicable)
Control + S	Save edited row for selected grid (if applicable)
Control + Z	Undo unsaved changes for the selected row of the active grid
Control + #	The hash sign in this shortcut represents any number between 1 and 9 inclusive and expands the appropriate grid
Page Up	Scroll up to the prior set of rows (if applicable)
Page Down	Scroll down to the next set of rows (if applicable)
Enter	Ends editing in the current cell