aACE Software

Overview of the Detail View

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> This guide explains how to navigate the detail view of aACE records. It is intended for beginning users.

The detail view displays information for a single record. It is the primary screen for interacting with data. To display the detail view, click the Go-to icon (>) beside a record in the list view.

Most module detail views contain similar features. This guide uses the Line Item Codes (LICs) module as an example.
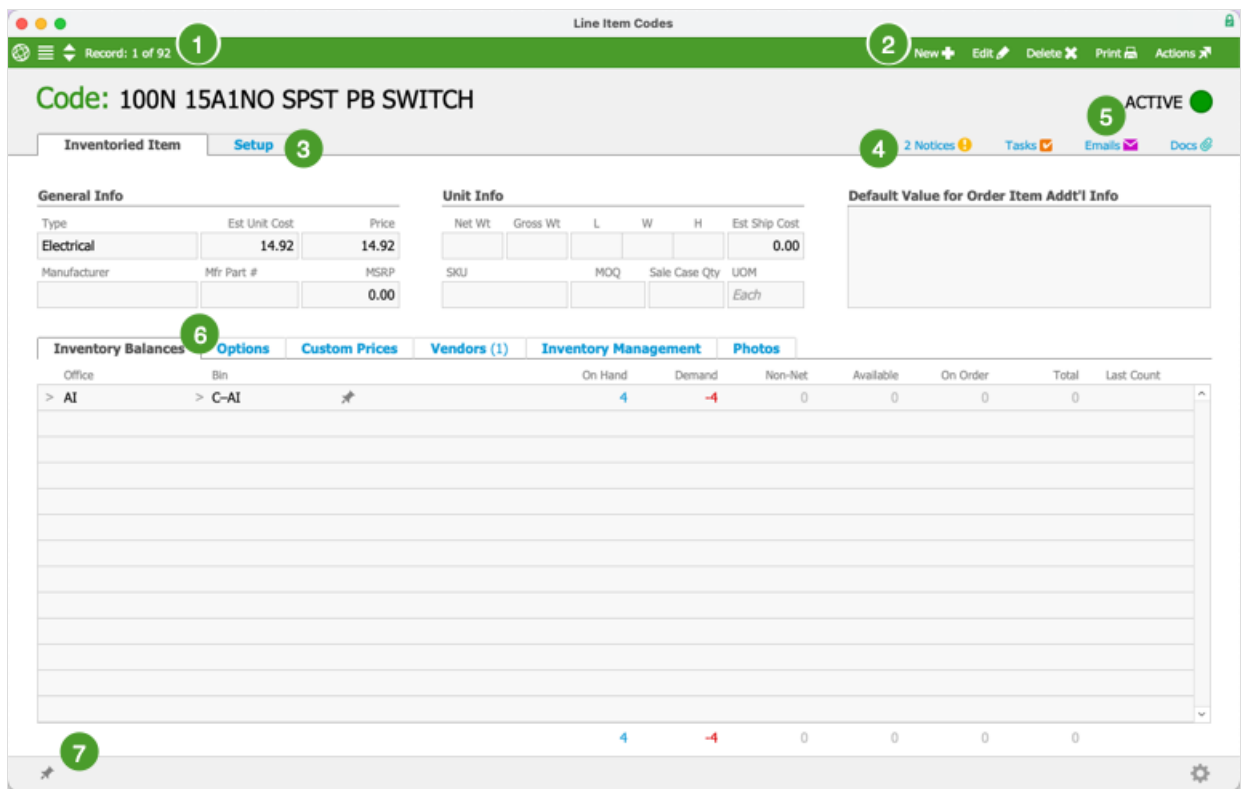
1. Record Navigation

The Record Indicator displays the number of records currently listed in the module's [list view](https://aace6.knowledgeowl.com/help/overview-of-the-list-view). Click the record numbers to access a prompt that will display the data for a specific record you have found on the list view.

This section also provides other navigation options. Clicking the Main Menu icon (🌐) brings the aACE Main Menu to the front of all open windows. Clicking the Record Seeker

icon (⬍) displays data from other records that are currently in the list view.

To return to the module's list view, click the List View icon (☰).

2. Record Management Options

Most module headers provide functionality for working with records:

➕	New	Displays the detail view with blank fields to populate for a new record.
✏️	Edit	Enters Edit Mode for updating the current record.
❌	Delete	Prompts the user to delete the current record if it is in Pending status. Note: For records in Open status, you must use the Actions options to void the record.
🖨	Print	Displays print options specific to the current record.
↗	Actions	Shows additional options for the individual record. Options may vary depending on whether the user is in Edit Mode or Non-Edit Mode.

3. Section Tabs

Related information is grouped in various tabbed sections. Click a tab to display that information.

Note: Some modules require you to click Save and capture any changes before you can access another tab.

4. Linked Records

These icons on the module header display dialogs for working with additional records related to the current record:

🟠	Notices	Presents the Notices Viewer for messages sent within aACE (https://aace6.knowledgeowl.com/help/working-with-notices) relating to the current record. These messages may generated either by the system or by a user.
☑	Tasks	Shows the Tasks Viewer for scheduled tasks (https://aace6.knowledgeowl.com/help/overview-of-tasks) relating to the record.
✉	Emails	Displays the Emails Viewer for the record's related messages that have been sent via email and stored within aACE (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration).
📎	Docs	Displays the Documents Viewer for documents attached to the record (https://aace6.knowledgeowl.com/help/working-with-documents).

5. Status Icon

Notes whether the record is in a Draft status, is currently Active status, Closed, Void, etc. Each type of record can have various record statuses (https://aace6.knowledgeowl.com/help/overview-of-record-status-levels), with various constraints or requirements.

6. Additional Portals

Clicking these tabs displays additional portals with more information.

7. Notes

Clicking the Pin icon (📌) displays a field to enter record-specific notes (https://aace6.knowledgeowl.com/help/adding-and-using-notes). These notes will be visible to other users who have access to the record. Pin icons are located throughout the aACE system.