


Use the following instructions to install Check Search:

Install the Dynamic Grid Module:


1. Download the files above.
2. On the Northstar Portal server, launch the Portal Config tool and select **Module Installer** under **Server Tools**.
3. Browse to the NorthStar.DynamicGrid.zip file that you downloaded and verify that the web.config file is correct.
4. Click the **Install** button. You will receive a dialog that the installation was successful.



Add the Dynamic Grid to the Portal:

1. Unzip the CheckSearchReport.zip file to a location on your computer (the ZIP file contains the file *CheckSearchReport.XML*).
2. In Internet Explorer, navigate to your NorthStar Enterprise Portal and log in as an administrator.
3. Create a new tab or click an existing tab that will contain the Dynamic Grid. If an existing tab, click the **Edit Tab** link in the top menu bar.
4. In the **Add Module** section, select **NorthStar Dynamic Grid** from the **Module Type** drop down list.
5. Change **Module Name** (for example, *Check Search*).
6. Click the **Add to "Organize Modules" Below** link. The module appears in box immediately below.
7. Organize the module as you see fit, then click the **Apply Changes** link on the top left of the page. The Grid displays that it has not been configured.
8. Click the **Edit** link on the top right of the Module title bar. The Detail window pops up with Report Management options.

9. Under Report Management, type a Title for the report (For example, **Check Search**).
10. Click the **Browse** button and select the *CheckSearchReport.XML* file.
11. Click the **Upload Report** button. The report is uploaded and the report appears in the list.
12. Select the report you just uploaded, then click the **Apply** button. The report is attached to the grid and the underlying page updates.
13. Close the Detail pop up window.

Using the Check Search Report:

- The report exposes three parameters: Start Date, End Date, and Report On. These options allow you to define the date periods in which to search.



Report Parameters: Start: 3/11/2010  End: 3/11/2010  Report On: Select one...  

- Make your parameter selections, then click the **GO** button. The grid will display “Loading...”, then display the search results.

Check Search

Report Parameters: Start: 1/1/2009 End: 1/26/2009 Report On: National: USA **GO**

Date

Unit #	Open	Close	Check #	Table #	Server #	Amount	Tax	Cost Center	Server	# Party	Discount	Discount
SalesDate: 1/26/2009 12:00:00 AM (Displaying 10 of 302 records - This group is continued on the next page)												
002	1128	1145	6	60	131	18.22	1.5		MONDRAGON, AUSENCIO	1	NONE	0
002	1136	1155	9	15	128	2.6	0.21		VELASQUEZ, ALEX	0	NONE	0
002	1136	1155	12	15	128	3.65	0.3		VELASQUEZ, ALEX	0	NONE	0
002	1132	1155	7	10	133	17.73	1.46		CONTRERAS, JOSE LUIS	2	NONE	0
002	1119	1148	3	11	133	24.77	2.04		CONTRERAS, JOSE LUIS	2	NONE	0
002	1132	1214	8	51	131	29.94	1.23		MONDRAGON, AUSENCIO	1	NONE	0
002	2034	2113	183	996	101	19.49	0.99		NICKOLYN, BRITTANY	1	NONE	0
002	2030	2105	181	30	156	11.74	0.97		REBOLLAR, JOSE	0	NONE	0
002	2030	2105	188	30	156	15.99	0.91		REBOLLAR, JOSE	1	NONE	0
002	2044	2107	184	40	156	26.46	2.18		REBOLLAR, JOSE	3	NONE	0

Records per page: 10

Show Filter - Records: 1 - 10 of 302 - Pages: 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10

- You can click a Check # to pop up check detail for that check.
- You can specify the number of records per page.
- Filtering is accomplished by clicking the **Show Filter** link in the footer of the grid.



Each column displays a filter which can be applied. Click the **Apply Filter** or **Remove Filter** links to perform those actions.



- Initial grouping is by Date, but you can add/change grouping levels by dragging column headers in and out of the grouping area (immediately above the column headers)



becomes

