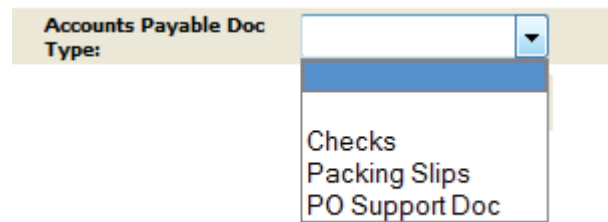


What is: a PickList?

A Picklist is any drop down within the system that limits a selection to only those listed in that field. More specifically they are indexes that can be custom made to fit the needs of a particular structure.

For Example: Accounts Payable Document Type may look like the picklist below



The image shows a screenshot of a software interface. On the left, there is a label 'Accounts Payable Doc Type:' in a light beige box. To the right of this label is a dropdown menu. The dropdown menu is currently open, showing three options: 'Checks', 'Packing Slips', and 'PO Support Doc'. The top of the dropdown menu has a blue header bar. The background of the dropdown menu is white with a thin border.

Picklist Values: Picklist values are displayed as drop down lists. Use this type of index value when search criteria needs to be contained or needs to be specific.

For example, use a State Picklist when an index value for a Document Class is State. This will confine users to having to use the State descriptions on the list rather than having a free type value. This setup will equate to improved accuracy when searching.

NOTE: EcoDox comes preconfigured with Picklists for Gender, Month, State, Suffix, Title, True-False and Yes-No.





Goal: This document focuses entirely on enabling a user to Create a Picklist within Singularity.

Complexity Level: Admin / Group Admin User

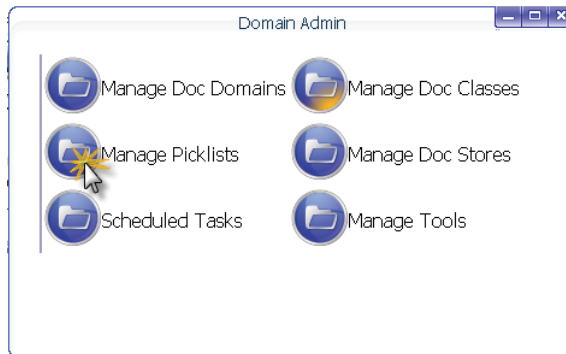
Prereq / Related Instructions: NONE

How To: Create a Picklist

Step 1: Navigate to Domain Admin - Select the **Domain Admin** icon from the **Fisheye Navigation Board**.



Step 2: Manage Picklist - Select the **Manage Picklist** icon from the **Fisheye Navigation Board**.



Step 3: List of Picklists - The list of existing Picklist will appear. If creating a new list, select the **New** button.

Singularity > Imaging Administration > Picklists

Picklists

 New

Picklist	Picklist Description	Delete
Gender		Delete?
Invoices for Approval	Invoices for Approval	Delete?
Month		Delete?
State		Delete?
Suffix		Delete?
Title		Delete?
True-False		Delete?
Yes-No		Delete?



Goal: This document focuses entirely on enabling a user to Create a Picklist within Singularity.

Complexity Level: Admin / Group Admin User


Prereq / Related Instructions: NONE

How To: Create a Picklist

Step 4: Name Picklist - Fill in the name and description.

Singularity > Imaging Administration > Create a Picklist
Add Pick List






Pick List Name

Pick List Description


Step 5: Save - Select Save




Select this button to Save

Step 6: New Picklist Created - The list of Picklists will appear with the new one that you have just created. Now select the new Picklist to add the values within the drop down.

Singularity > Imaging Administration > Picklists
Picklists





Picklist	Picklist Description	Delete
Gender		Delete?
Invoices for Approval	Invoices for Approval	Delete?
Month		Delete?
State		Delete?
Suffix		Delete?
Title		Delete?
True-False		Delete?
Yes-No		Delete?
testPicklist	testPicklist	Delete?



Step 7: Picklist Values - Select the Picklist Values.

Singularity > Imaging Administration > Picklist Detail
testPicklist Picklist Detail

Picklist Name

Picklist Description



Goal: This document focuses entirely on enabling a user to Create a Picklist within Singularity.

Complexity Level: Admin / Group Admin User

Prereq / Related Instructions: NONE

How To: Create a Picklist

Step 8: New Picklist Value - Select **New** to add a value to the Picklist.

Singularity>Imaging Administration>Picklist Values
testPicklist Picklist Values

Picklist Detail Picklist Values

page: 1 goto: [dropdown]

Order	Name	Value	Remove
-------	------	-------	--------

New ABC Alphabetize

Step 9: New Picklist Value - Select **New** to add a value to the Picklist.

Singularity>Imaging Administration>Picklist Value
testPicklist Picklist Value Detail

Picklist Detail Picklist Values

Save

Value Name:

Value:

Step 10: Save - Select Save

Save

Select this button to Save

Step 11: New Value - The new values added will appear. Select **New** to add another value to the Picklist and follow steps 8 to 10 until all values have been added.

Singularity>Imaging Administration>Picklist Values
testPicklist Picklist Values

Picklist Detail Picklist Values

page: 1 goto: [dropdown]

Order	Name	Value	Remove
↑ ↓	BLUE	BLUE	Remove?

New ABC Alphabetize



Goal: This document focuses entirely on enabling a user to Create a Picklist within Singularity.

Complexity Level: Admin / Group Admin User

Prereq / Related Instructions: NONE

Step 12: Arrange Values - If you wish to have a specific arrangement select **Alphabetize** or use the **up and down arrows** to move the values into the desired order.

Singularity > Imaging Administration > Picklist Values
testPicklist Picklist Values

Picklist Detail Picklist Values

New ABC Alphabetize

page: 1 goto: ▼

Order	Name	Value	Remove
↑ ↓	BLUE	BLUE	Remove?
↑ ↓	GREEN	GREEN	Remove?
↑ ↓	YELLOW	YELLOW	Remove?
↑ ↓	RED	RED	Remove?

Step 13: Save Values - Select Picklist Detail

Singularity > Imaging Administration > Picklist Values
testPicklist Picklist Values

Picklist Detail Picklist Values

New ABC Alphabetize

page: 1 goto: ▼

Order	Name	Value	Remove
↑ ↓	BLUE	BLUE	Remove?
↑ ↓	GREEN	GREEN	Remove?
↑ ↓	YELLOW	YELLOW	Remove?
↑ ↓	RED	RED	Remove?

Step 13b: Save Values - Select the **Save** button

Singularity > Imaging Administration > Picklist Detail
testPicklist Picklist Detail

Picklist Detail Picklist Values

Admin Save

Picklist Name: testPicklist

Picklist Description: testPicklist

Now you are ready to add this picklist as an index to a Doc Class.

DATE:

TAG:

testPicklist:

- BLUE
- GREEN
- RED
- YELLOW

Complete!!!

