



# Using the Data Grid

1.005

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PROJECT  NITY



## Lesson Details



Learning Objectives:

To ensure that trainees have a general understanding of the functionality of the Data Grid as a foundation for later training modules.



Duration:

60 minutes



Pre-requisites:

1.003 User Interface Basics



Recommended:

None

# Agenda



Introduction



Maximize/Collapse  
the Data Grid



Performing Actions  
on Grid Rows



Q&A

# Agenda



**Introduction**



**Maximize/Collapse  
the Data Grid**



**Performing Actions  
on Grid Rows**



**Q&A**

# Introduction



Used for entering quantitative information in a tabular layout.

It has controls that enable you to:

1. Filter/Maximize/Hide the grid
2. Perform actions on grid rows
3. Page through grid rows

	* Entity	* Account	* Authority	* Output	* Related Party	* NOV-19 YTD DR	* NOV-19 YTD CR
1	6030 - Depart...	10230 - SAU Ba...				\$100,000.00 DR	
2	6030 - Depart...	10230 - SAU Ba...	1043 - Educati...			\$100,001.00 DR	
3	6030 - Depart...	10230 - SAU Ba...	1150 - Gambli...			\$100,002.00 DR	
4	6030 - Depart...	10230 - SAU Ba...	1154 - Gambli...			\$100,003.00 DR	
5	6030 - Depart...	10230 - SAU Ba...				\$100,004.00 DR	
6	6030 - Depart...	10230 - SAU Ba...	1043 - Educati...			\$100,005.00 DR	
7	6030 - Depart...	10230 - SAU Ba...	1150 - Gambli...			\$100,006.00 DR	
8	6030 - Depart...	10230 - SAU Ba...	1154 - Gambli...			\$100,007.00 DR	
9	6030 - Depart...	10230 - SAU Ba...				\$100,008.00 DR	
						\$0.00 CR	

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The Data Grid is used for entering quantitative information in a tabular layout.

The Grid is used for:

1. Entering transaction data pertaining to an Adjustment;
2. Various Administration screens.

Values can be entered into cells either by selecting from a lookup or directly typing a value.

The Data Grid has controls that allow the users to:

1. Filter rows on the grid/Maximize/Hide the grid
2. Perform actions on grid rows
3. Page through grid rows.

The Data Grid is highly configurable, so the columns on the grid are specific to the work item's purpose.

# Introduction



The exact configuration of the grid is dependent on its utilization.

For example, the column layout and configuration on the grid used to enter transaction details for a Budget Allotment Schedule is different to the configuration that is applied to the grid used to manage Reference Data.

	Object	Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct	Nov	Dec	Jan
1	ip										
2	ip										
3	ip										
4	ip										
5	ip										

	Organization	Fund	Reserve %	Enabled	Entity Overridable	Department Overridable	DEL	Charges
1	ip			Yes				
2	ip			Yes				
3	ip			Yes				
4	ip			Yes				
5	ip			Yes				



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# Browser Support



## Supported

- ✓ New Edge (Chromium-based)
- ✓ Chrome
- ✓ Firefox

## Not Supported

- × Old Edge
- × Internet Explorer

## Pop-up blockers

Please ensure pop-up blockers are disabled for the BIDS site in your browser. Refer to your browser documentation for information on allowing pop-ups.



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The application supports the latest versions of the most common web browsers; Microsoft Edge, Chrome, and Firefox.

Microsoft's Internet Explorer and the old version of Edge are not supported.

The application uses pop-ups, so please disable pop-blockers in your browser. Refer to your browser documentation for information on how to do that.

# Agenda



Introduction



**Maximize/Collapse  
the Data Grid**



Performing Actions  
on Grid Rows



Q&A

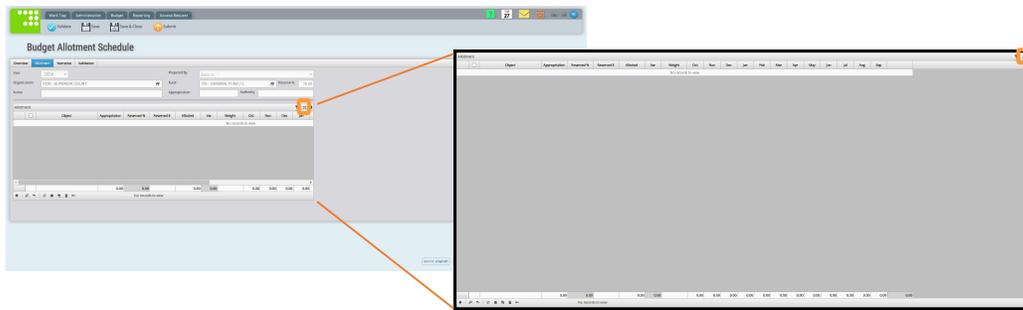


# Maximizing the Grid



The Maximize control appears in the top-right corner of the grid;

- Click  to expand the grid to occupy the entire screen;
- The icon changes to  Click this to restore the grid to its original size.



When the document is initially loaded, the grid is sized according to the specifications the document designer sets. These specifications include the grid's position on the page and its dimensions. It may be advantageous to the user to maximize the grid to fill the screen, allowing greater area for data entry.

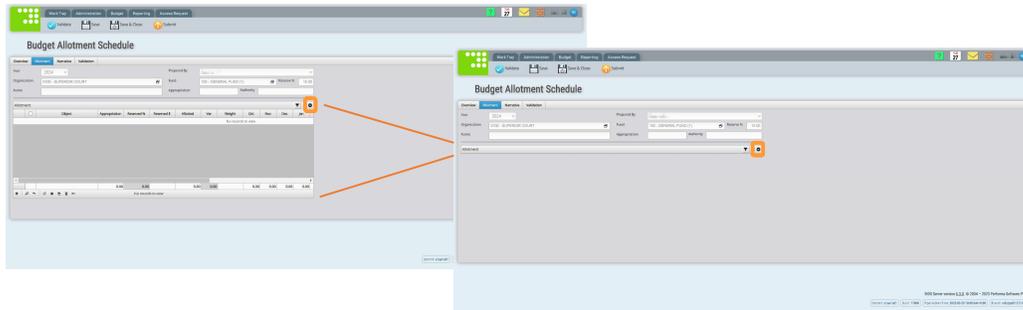
The Maximizing/Hiding controls appear in the top-right corner of the grid.

# Collapsing the Grid



The Collapse control appears in the top-right corner of the grid;

- Click  to collapse the grid;
- The icon changes to  Click this to expand the grid.



The grid can be collapsed by clicking the Collapse icon in the top-right corner of the grid.

## Resizing Grid Columns



Like Excel, columns on the grid can be resized by dragging the dividing line in the column header row.



Columns revert to their original width following any activity that refreshes the page, such as saving the work item.

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# Agenda



Introduction



Maximize/Collapse  
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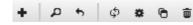
**Performing Actions  
on Grid Rows**



Q&A



# Row Actions



The Row Actions toolbar is displayed in the bottom left corner of the grid. This toolbar provides the following functionality:

Action	Icon	Description
Add		Add a new empty row to the grid
Find Records		Create an expression to find the data you want
Reset Filters		Clear the filters set by Find Records and return all grid rows
Refresh		Replaces the content of the grid with the data stored in the database. Any unsaved changes you have made to the grid will be lost.
Settings		Allows you to change the grid's refresh mode
Copy		Copy selected row(s)
Delete		Delete selected row(s)

The Row Actions toolbar has several functions:

- 1. Add:** The first step in manually entering data on the grid is to create a new, empty row.
- 2. Find records:**
- 3. Reset Filters:**
- 4. Refresh:**
- 5. Settings:**
- 6. Copy:** Copy existing row(s)
- 7. Delete:** Delete existing row(s)

## Row Actions: Copy row(s)



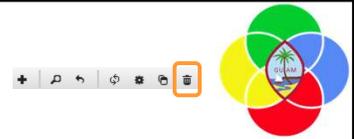
You can achieve a productivity gain by copying existing row(s) to save having to re-enter all the values:



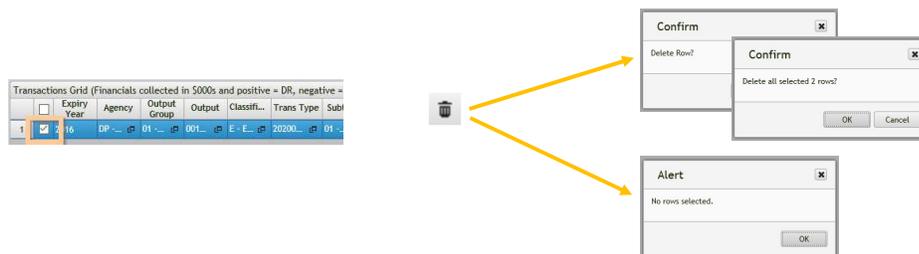
You can achieve a productivity gain by copying existing rows to save having to re-enter all the values. Once the row has been copied you can then simply update the required cells on the row.

1. Select the row (or rows) you want to copy by clicking the checkbox in the first column;
2. Click the Copy icon to copy the selected row(s). If multiple rows were selected a confirmation message is displayed;
3. A message is displayed if no row(s) were selected;

## Row Actions: Delete row(s)



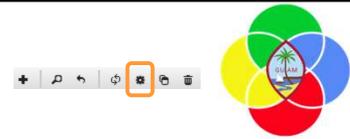
Similar process to copying rows:



Deleting rows from the grid is a very similar process to copying rows.

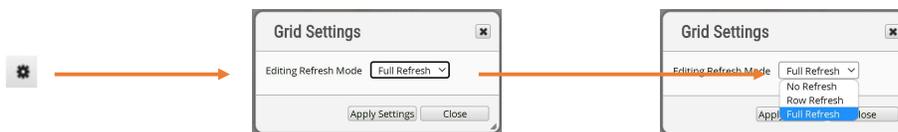
1. Select the row (or rows) you want to delete by clicking the checkbox in the first column;
2. Click the Delete icon to delete the selected row(s). A confirmation message is displayed;
3. A message is displayed if no row(s) were selected.

## Row Actions: Settings



Click the Settings icon to edit the Refresh Mode settings. The Grid Settings dialog box is displayed:

Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct
	15	0	0	-100	223 (2,2,3)	100
100	15	15	85	-116	223 (2,2,3)	200
100	15	15	85	0	223 (2,2,3)	85
	15	0	0	-200	223 (2,2,3)	200
	15	0	0	-200	223 (2,2,3)	200



The grid may perform actions as you enter values. An example of this is the Budget Allotment Schedule which calculates the variance between the Allotted value and the sum of the monthly allotments each time you enter a value. This causes the grid to refresh to update the new Var number.

By default, the whole grid is updated, but you can modify this behavior.

Click the **Settings** icon to edit the Refresh Mode settings; the Grid Settings dialog box is displayed where you can select from one of these options:

- **No Refresh** – the grid does not refresh. For example, the Var value is not refreshed on any row.
- **Row Refresh** – only the row being updated is refreshed. For example, the Var value is refreshed only on the row being edited.
- **Full Refresh** – the default, the whole grid refreshes.

# Hands-on Lab Exercise 1



1. Add new and copy rows on the data grid

Duration: 5 minutes



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## Objective

1. To add new, copy and delete rows on the data grid;

**Duration:** 5 minutes

## Process

1. Open your internet browser and navigate to the application;
2. From the menu, select **New Budget Allotment Schedule**;
3. On the **Overview** tab, enter:
  1. Organization: Select an item from the popup
  2. Fund: Select an item from the popup
  3. Name: 1.005 {your name}
4. Go to the **Allotment** tab;
5. Click the **Add** icon on the Row Action Toolbar
6. On the new row, select an **Account** from the popup
7. Select the row and click the **Copy** icon
8. On the new row, select an Account
9. Select both rows and click the **Copy** icon
10. Select different accounts on each row

## Hands-on Lab Exercise 2



1. Collapsing the data grid
2. Maximizing the data grid
3. Resizing data grid Columns

Duration: 5 minutes



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### Objective

1. To collapse/expand, maximize/minimize the data grid, and resize columns on the grid;

**Duration:** 5 minutes

### Process

Still on the Allotment tab:

1. Click the **Collapse** icon to hide the grid;
2. Click the **Expand** icon to display the grid again;
3. Click the **Maximize** icon to expand the grid to occupy the entire screen;
4. Click the **Minimize** icon to restore the grid to its original size;
5. Resize a column on the grid by dragging on the divider between the column headers,, make the column much wider
6. Change the selected Account on one row of the grid. The column width remains as you set it.
7. Go to the Overview tab, and then return to the Allotment tab, The column widths are set back to the default.
8. Click the **Save** icon.

## Row Actions: Filter Records



You can add filters to the grid's columns, click the filter icon on the top-right of the grid:

Allotment										
	<input type="checkbox"/>	Account	Object	Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct
1	<input checked="" type="checkbox"/>	F100*24*0100**111	111 - SALARIES AND WAGES - REGULAR		15	0	0	-100	223 (2.2:3)	100



Allotment										
	<input type="checkbox"/>	Account	Object	Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct
1	<input checked="" type="checkbox"/>	F100*24*0100**111	111 - SALARIES AND WAGES - REGULAR		15	0	0	-100	223 (2.2:3)	100



Once your grid has a lot of rows, it can be handy to be able to filter the grid to those that meet specific criteria.

Click the filter icon at the top-right corner of the grid to add a filter row to the header; the dropdowns contain an entry for each unique value in the column.

# Filter Operators



Financial columns support filtering by operators, including ranges:

Allotment										
	Account	Object	Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct	
1	*100*24*0100**111	111 - SALARIES AND WAGES - REGULAR		15	0	0	-100	229 (2,2,3)	100	

Supported search operators:  
Simple: =, <, <=, >, >=  
Range: : (e.g. 50:70)



Numeric columns support filtering by simple operators:

- = - equals
- < - less than
- <= - less than or equal to
- > - greater than
- >= - greater than or equal to

You can also specify that the value must be within a range by separating the high and low number with a : (colon), such as 100:200; all rows where the value in the column is between 100 and 200 (inclusive) are returned.

# Filter Dropdowns



Dropdowns contain an entry for each unique value in the column:

Allotment										
	<input type="checkbox"/>	Account	Object	Appropriation	Reserved %	Reserved \$	Allotted	Var	Weight	Oct
										101:200
1	<input type="checkbox"/>	*100*24*0100**450	111 - SALARIES AND WAGES - REGULAR 230 - CONTRACT 240 - SUPPLIES 450 - CAPITAL 290 - MISCELLANEOUS		15	0	0	-200	223 (2.2.3)	20



Dropdowns contain an entry for each unique value in the column, regardless of other filters that you may have applied. For example, if you filtered a numeric column using a range which returns a single row, the dropdown will still contain an entry for each value from all the rows on the grid.

# Hands-on Lab Exercise 3



1. Filtering the grid using Column Filters

Duration: 10 minutes



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## Objective

1. To filter the grid using numeric operators and a dropdown.

**Duration:** 10 minutes

## Process

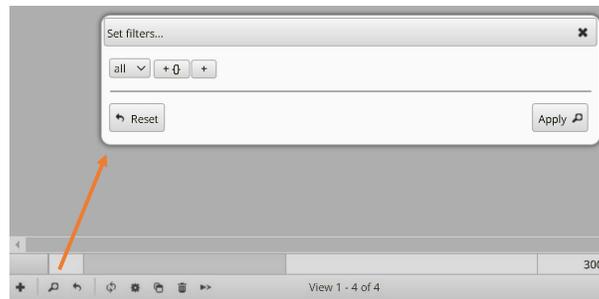
Still on the Allotment tab:

1. Click the **turn on column filters icon**
2. On each of the first three rows, enter a value in the Oct column; 100, 200 255 respectively.
3. On the third row, enter 300 in the Appropriation column . The Var column should now be 0).
4. Enter < 0 in the filter text box for the Var column and press Enter. Row 3 is removed as it equals 0.
5. Clear the filter box and press Enter.
6. Enter 200:255 in the filter text box for the Oct column and press Enter. Row 1 is removed as it is not in the specified range.
7. Click the Object dropdown and select Travel: both filters, Object and Oct, are applied so no rows are returned.

# Find Records



Create an expression to find the data you want:



While the Column Filters are sufficient for most cases, sometimes you need something a little more complex. For example, you want to find any rows where the value in a column is empty (i.e., NULL). When you click the **Find records** icon a Set filters dialogue opens in which you can create an expression to filter the grid so that only rows that meet your criteria are displayed.

You can add multiple rules, and create nested rules for the most complex cases.

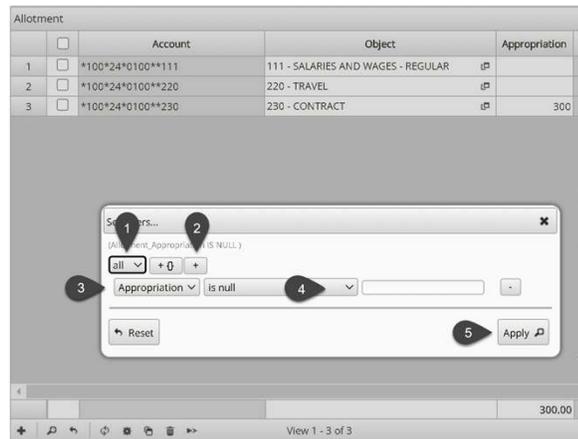
## Find Records



- Select a modifier
- Add a rule
- Select a column
- Select an Operator
- Apply the expression

Add additional rules if required. The modifier specifies if **all** or **any** of the rules must be met.

Click Reset to clear the set filters dialog.



To create an expression:

1. Select a modifier; the options are **all** or **any**. These apply if you define more than one rule; all means that all of the rules must be met for the row to be returned, any means any of the rules must be met.
2. Click the **add rule** button to start creating a rule.
3. Select a column, for example, Appropriation
4. Select an operator; the options are:
  1. Equal, not equal
  2. Less, Less or equal
  3. Greater, greater or equal
  4. Is null, is not null
  5. Is in, is not inEnter a value in the text box to set the criteria, this is not required for 'is null' and 'is not null'.
5. Apply the filter once you have defined all the rule(s) that you need.

To find all the rows where, for example, the Appropriation column is empty:

- Select the Appropriation column
- Select the 'is null' operator

# Hands-on Lab Exercise 4



1. Filtering the grid using Find Records

Duration: 5 minutes



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## Objective

1. Filter the grid using the Find records dialog to find all rows where the Appropriation value is empty (null).

**Duration:** 5 minutes

## Process

Still on the Allotment tab:

1. Click the **Find records** icon to open the Set filters dialog
2. Select the **all** modifier
3. Click the **Add rule** icon to begin defining a rule:
4. Select the **Appropriation** column
5. Select the **is null** operator
6. Click **Apply**

# Agenda



Introduction



Maximize/Collapse  
the Data Grid



Performing Actions  
on Grid Rows



**Q&A**





Thank you for undertaking the lesson:  
**Using the Data Grid**

Please complete the survey:



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