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ESCAPE ONLINE

Escape Online

Data Grids

Presented by: Terri Hammond

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Agenda

- Using the Grids
 - Filtering the Grid
 - Sorting Columns
 - Grouping Columns
 - Adding Columns
 - Removing Columns
 - Freezing Columns
 - Saving the Layout
 - Exporting Data
- Reporting
- Special Considerations
- Questions and Answers

Using the Grids

■ Search/List/Form has Grids

Feature	List	Grid
Open Form	✓	
Dynamic Update	✓	
Basic Filtering (one value)	✓	✓
Advanced Filtering		✓
Sort columns	✓	✓
Re-arrange columns	✓	✓
Add/Drop columns		✓
Freeze columns		✓
Grouping		✓
Save layout		✓
Save/Print as Report		✓
Totals	✓	✓
Sub-totals		✓
Export to Excel	Worksheet (protected)	Workbook

Filtering the Grid

- Drop-down to the right
- Shows funnel if filtered
- Select blank
- Select any data
- Select multiple

Sorting Columns

- Click on column heading
- Even if it is in the header
- Separate from grouping
- Use Shift key for multiple

Grouping Columns

- Drag heading to header row
- Drag multiple
- Separate from sorting
- Move independently
- Show/hide arrow on left
- Table of contents arrow on right

Adding/Removing Columns

- Drop down on right of column heading
- Columns on list in order of appearance
- Rest of columns from database in alpha order
- Select/unselect dynamically

Freezing Columns

- Drag dotted line to the right
- Columns stay in place when you scroll to the right
- To move columns, press and hold mouse and drag to new location

Saving the Layout

- One layout for each activity
 - Save – Saves the layout
 - Load – Loads saved layout
 - Clear – Deletes saved layout
- Includes selected columns, grouping, and freezing
- Does not include sorting or filtering

Exporting Data

- Launches Excel 2007 only
- If not Excel 2007, saves to My Documents folder (file name displays in status bar)
- Launches a new workbook
- Based on original sort/list, does not include updates
- WYSIWYG
- Export w/o grouping/sorting

Reporting

- WYSIWYG
- Print to local/network printer
- Annotate
 - Highlights
 - Sticky notes
- Save as XPS file

Reporting

- Page setup through printer driver
- Tiles pages that don't fit on one page (just like Excel)

Special Considerations

- Add/remove columns
 - Employees (10.03)
 - Employee Benefits (10.03)
 - Vendor Requisitions (10.04)
 - Fixed Assets (10.04)
 - Vendor List (10.04)
 - Adjust Payroll (10.04)
 - Employee Pay Mgmt (10.04)
 - Payroll Setup (10.04)

Special Considerations

- Export to Excel
 - Some columns only export code
 - Some columns only export description
- Details Button
 - Not supported

Special Considerations

- Total lines from grouping
 - Export to Excel
 - Subtotal/total for single entry
- Vendor Id on grid shows full SSN (s/b fixed in 10.04)
- Grouping by Location works in Finance but not in HR/Payroll (s/b fixed in 10.04)

Questions and Comments

- Thank You!
