

Performing Tasks

Some lists (e.g., approvals, journal entries) will have task menus. If you select an option from the Task menu on a list, the task will apply to ALL of the records on the list, according to the rules for that list. For example, approval lists will post approvals/denials for all records on the list that are not flagged as “deferred.”

Using the Grid

Every search/list/form activity in Escape Online has a Grid button which converts to a Microsoft-Outlook style data grouping workspace. You can group the grid by multiple columns; you can sort by multiple columns; you can filter columns by data; you can add/drop data columns from a drop-down list.

So what is the difference between the Escape Online 5 list and the grid? Well, there are many differences. The list is for editing and managing your changes. It is where you can open the form, and get dynamic updates of your changes. The list also includes some basic spreadsheet-like capabilities, such as sorting and filtering.

The grid is for managing the data. You can filter, sort, group, fix columns, add/drop columns and create simple reports. The table below and the following paragraphs explain the features of the grid in detail.

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

Figure 1-14 List and Grid Comparison Chart

1. To group your grid, drag a column heading into the header row.

2. If you right-mouse click on a column heading you get a grid of all possible columns for the grid. Just click to add/drop a column from the grid.

3. If you click the down arrow on a column heading, you get a list of values for the grid. You can filter the grid by selecting/deselecting values.

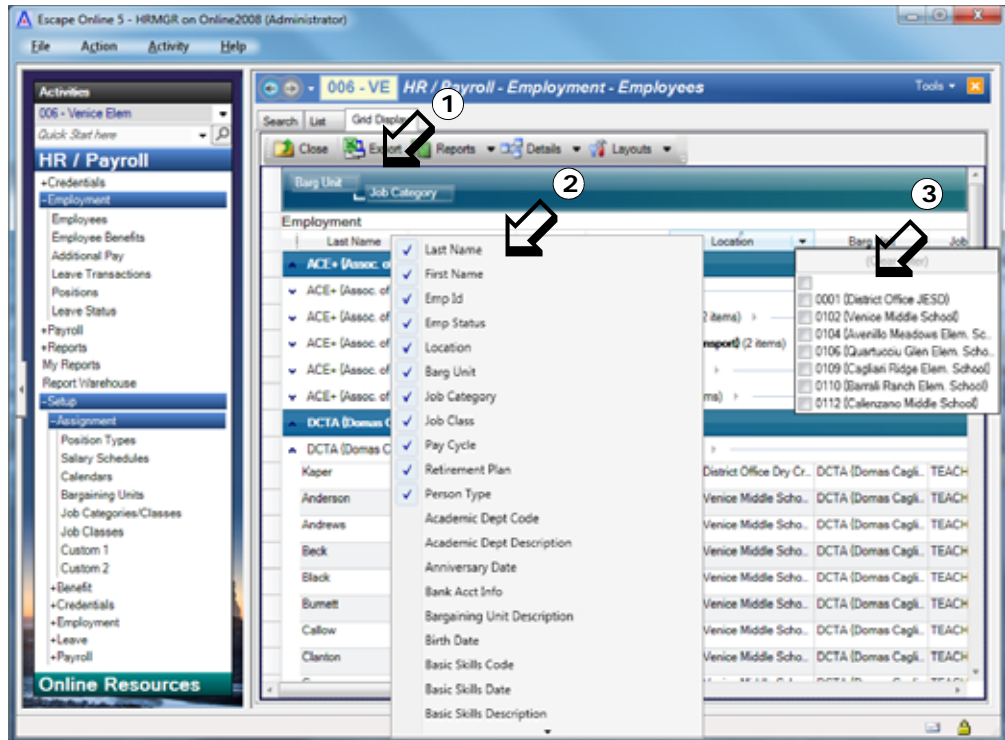


Figure 1-15 Working from the Grid



Tip

The first time you load the grid during an Escape Online session, it will take a few extra seconds.

The grid is built from the list created by the search. It will not dynamically update based on changes to a record. It is also not affected by any filters or sorting criteria performed on the list.

The grid will only show records that were on the list when the Grid button was clicked. This means that if you have a large list and you click the Grid button before the list is finished building, the Grid will only contain those records that were loaded at the time the button was clicked.

Filtering the Grid

Every column has entries (e.g., teacher, librarian, counselor are all job category entries). You can filter the grid by all, none or selected entries. At the right of each column is a drop-down list of all entries for that column. You can simply check and uncheck entries to only show/hide those entries on the grid.

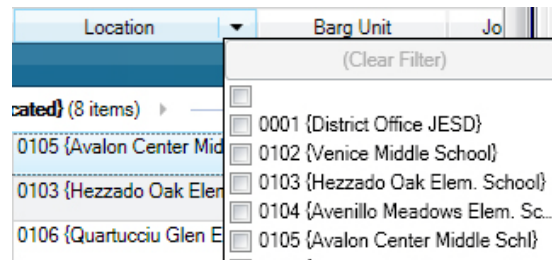


Figure 1-16 Filtering the Grid

If you have filtered a column a funnel icon will appear in the column heading, alerting you.

Sorting/Arranging Columns on the Grid

You can sort any column or change its location. To sort a column, click on the heading once to sort ascending, again to sort descending, a third time to remove the sort.

If you want to sort more than one column, hold down your Shift key to sort the second (or third) column.

To move a column, press and hold your mouse and drag the column to the new location.

Grouping Columns on the Grid

If you want to group a column (or multiple columns), drag the column heading to the header row of the grid, as shown below. This will group records by the entries for that column. For example, you may want to group by bargaining unit and then job category.

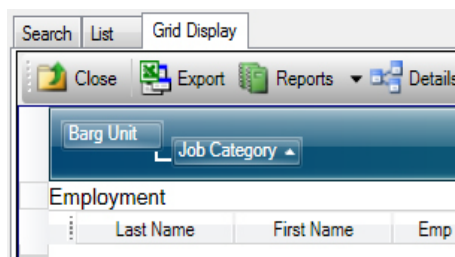


Figure 1-17 Grouping the Grid

Note that grouping is separate from sorting!

You can group by one column, but sort by another. The grid is very flexible. To quickly sort your grouped columns, click on the groups in the header row. To sort more than one column, hold down your Shift key.

At the right side of every grouping is a drop-down arrow that displays a list of all entries in the grouping, like a table of contents. If you click on an item in the drop-down, the grid will “jump” to that group. For example, if you clicked on the DCTA group in the drop-down below, the grid would jump to the DCTA grouping.

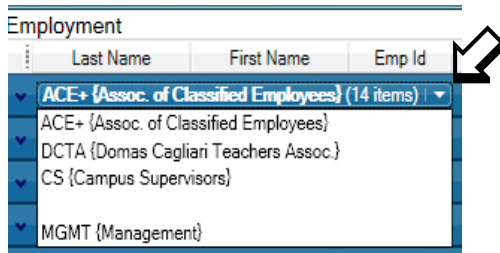


Figure 1-18 Grid Grouping Drop-Down List like a Table of Contents

Adding/Dropping Columns on the Grid

For your convenience, the columns you can add and drop are listed on the drop-down in a particular order: the first columns listed are the default columns, presented in the order in which they appear on the grid; the second set of columns are all of the columns from the tables that you can add/drop onto the grid. This second set is listed in alphabetical order to make finding particular columns easier.

Freeze Columns on the Grid

Just like in Microsoft Excel, you can “freeze” columns so that they do not scroll. For example, you can freeze the last/first name of employees and then scroll through the rest of the columns.

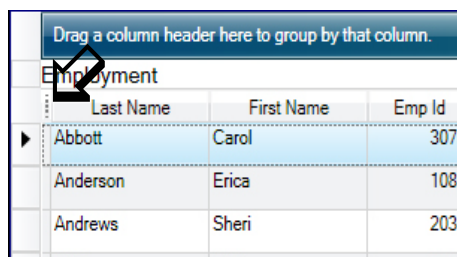


Figure 1-19 Fixed Columns on the Grid

At the top left corner of the column rows, there is a “column” that displays as a dotted line. This is the freeze column. If you press and hold your mouse button on this column, it will change to a thick bar that you can drag to the right, defining which columns you want to freeze. The columns at the left of this bar are now frozen. That means when you scroll to the right these columns will not scroll; they will stay in place, always displayed in the workspace.

Saving the Layout of the Grid

You can save a default layout for the grid, one for each activity. The default will save your selected columns (added/dropped), grouping and your freezing. It will not save sorting or filtering. There are three buttons on the grid for the layout.

- ▶ Save – Saves the selection of columns (those added/dropped), the grouping of columns and the freezing of columns.
- ▶ Clear – Clears and deletes the default layout.
- ▶ Load – Loads the default layout.

You can save one layout per activity. The layout is saved to your hard drive. If you save again, it overwrites the layout already saved.

Exporting the Grid to Excel

You can export the grid to Microsoft Excel using the Export button. The entire grid, including column headings, filtering, grouping line items and total lines items, will be exported to Excel, basically exactly what you see in the grid. Note, however, that the export is still based on the original search criteria. It will not contain any updates to records saved since the creation of the grid.

The export automatically launches a new workbook in Microsoft Excel. The workbook is open for editing

Making Grid Reports

The grid includes a simple report mechanism. You can control your page setup, and access your printer driver from the grid.

The report will print exactly what you see on the grid. It will tile pages if all of the columns do not fit on a single page, just like Microsoft Excel.

In the grid report viewer, there are several buttons:

- ▶ Close/Return – Closes the grid report viewer
- ▶ Print – Opens the Microsoft Windows printer dialog box. The controls for your printer are defined by your printer driver, not Escape Online. For more information about your printer driver, please contact your network administrator.
- ▶ Copy – The Copy button on the grid is not supported at this time.
- ▶ Save – Saves the report to an XPS file. XPS is Microsoft's flat file format. It is similar to a PDF in that it can be distributed freely. Escape Online automatically comes with an XPS viewer. In addition, Vista, Windows 7 and any computer with IE 6.0 or higher automatically has an XPS viewer.

- ▶ Full Screen – Displays the report in a full screen window, outside of the workspace. This can be very helpful when working the grid and making changes to forms simultaneously.
- ▶ Email – The Email button on the grid is not supported at this time.
- ▶ Highlight – Draws a yellow highlight across whatever you have highlighted in the report. To highlight, drag your mouse across the text.
- ▶ Sticky Notes – Places a sticky note in the location of what you have highlighted in the report. You can also move sticky notes by dragging them to a new location.
- ▶ Show/Hide Annotations – Toggles annotations (sticky notes and highlights) on and off.
- ▶ Remove Annotation – The Email button on the grid is not supported at this time.
- ▶ Zoom – Zooms the report in a variety of ways.
- ▶ Pagination – Allows you to go from page to page, or jump to the beginning or end of the report.

Special Considerations

The grid is being released in phases. This is the first phase. There are some items that we have discovered and are researching for solutions:

- ▶ Only the HR/Payroll-Employment-Employees and Employee Benefits activities support adding columns from the database. We will expand the number of activities with this capability with each release.
- ▶ Columns are supposed to export to Microsoft Excel as you see them on the grid. However, some columns are only exporting the code and some are only exporting the description. However, most export exactly what you see on the grid.
- ▶ If you create a group, the grid creates a total line, even if that doesn't apply to the type of column you have grouped. For example, if you group by bargaining unit, job category and then job class, you will see three total lines on the grid even though those columns do not total. These total lines will also be displayed on the report and the export to Excel.
- ▶ Every group has a total line, and every subgroup has a subtotal line. This may cause "extra" lines for small groupings (e.g., groups that contain only one or two records).
- ▶ The Details button on the grid is not supported at this time.