

Customizing Views Transcript

BisTrack allows you to customize the view of information shown in the results area. In this course, we will explore the various ways you can configure the display of columns. We will walk through the steps to add or remove columns using Column Chooser and then introduce you to the Group by option for organizing data. Finally, we'll show you how to restore the display back to its original settings.

Before we begin, a few key points about configuring views. All of the techniques shown are applicable to any View within BisTrack. Any changes made are user specific and do not affect how others set their Views. After making significant changes, a Best Practice is to close BisTrack to save the settings.

You can maximize the display of information that is relevant to you when you sort, resize and relocate columns in a View. To begin, we will use the Products View and set the Find field to Nails. The matching products are shown in the results area. Records can be sorted into ascending or descending. Simply click on the column heading you want to sort.

In this example, we will resort Available Stock. The products are listed in ascending order from low to high values and an up-arrow icon is shown in the column heading. Clicking on the same column heading again sorts them into descending order and changes the icon to a down-arrow. Clicking on it a third time, returns the column to its original order.

All columns in the results grid can also be resized. Click on the line that separates two columns for the column you want to change. A line with two arrows on both ends appears. Drag the line to the left to make the column narrower.

Next the Description column is made wider by clicking on the separator line and dragging it to the right. You can arrange the columns on any View so that the data you use most frequently is visible in the leftmost columns. Find a column that you want to see without having to scroll across columns.

Point on the heading and then drag and drop it to where you want it to appear. The Bin Location column is selected and moved to appear between the Description and Standard Buy Price columns.

You can choose to add or remove columns from Views. The View tab option appears whenever information is displayed in a grid just like you see here with this list of Products. Open it and then select Column Chooser. A pop-up window opens and lists the names of fields not currently included in the View.

Any of these can be added to display in the grid. For example, to add the Manufacturer Code, click on the name and then drag and drop it where you want it to appear. The column is moved to the grid and is no longer displayed in the Column Chooser box.

You can also remove columns from a View. Click on the heading and then drag and drop it into the Column Chooser box. To close the Column Chooser window, click on the X.

Information listed in the results area can be grouped by a specific column. Doing so organizes long lists making it easier to find specific data. Using Find Documents, a list of sales orders is shown. Just above the column heading names, is an area to drag a column to group by.

The Sale Type is clicked and then dragged and dropped into the area. The column heading now appears in the Group by box. Instead of seeing the individual sales orders, just the Sale Type names are shown and the number of records contained within each group.

To expand the group and display the sales orders, click the drilldown icon. The records for the group are shown and for this type of View, Totals are displayed. To collapse the group, click on the up-arrow icon.

Multiple levels can also be created. To group by Sale Type and then Status, drag and drop the Status column heading into the Group by area. The records are now organized by Sale Type and then Status. You can continue to add Group by levels as desired.

Drilldown to expand the Sale Type group. Instead of the actual sales orders, we see the next level in the Group by. From here you can drilldown to view only those orders with a specific Status. For example, to show Parked orders, drilldown on that group's icon.

The groups are automatically sorted in ascending order as noted by the up-arrow. With the Delivered Sale Type group expanded, the statuses are listed in ascending alphabetical order. Click on the down-arrow to change the order to descending.

To remove a group, simply click on the X icon. The column heading is removed from the area. Most Views allow you to control the use of the Group by function from within Options. When checked, the Group By Box area is available. To take it away from the View, disable the check box.

You can restore any View to its original settings. Here we have the Products View open. Earlier, we changed the size of two columns, relocated one from a different part of the grid, used Column Chooser to add one and moved others in. To restore the display, open the View tab and then select Reset View.

The results area is refreshed with the initial settings. The Product Code and Description columns are returned back to their original size. The Manufacturer Code is no longer shown. The Bin Location is returned to its previous location and the Column Chooser fields are restored.

BisTrack provides a great deal of flexibility for customizing Views to meet each users' specific needs. We reviewed the process to sort information into ascending or descending order, resize and relocate columns in the grid. We used the Column Chooser and then organized records using the Group by settings. Finally, we showed you how to restore views to their original settings.

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