Using Grids and Grid Tools

You use grids all the time. They show a selected list of records, displaying each record in its own row.

You then see the information that each record contains in the columns.

During this course, you first learn how to find records on the Landing Page. When applications launch, they show the grid on this page.

Then learn how to adjust grid columns to see the information you need.

You next see how to filter and group records to organize what information displays on each grid.

To end the course, go on a tour of a grid. See where you find grid features on the interface.

Select an option to learn about grids.

Objectives

- The Landing Page
- Adjusting Columns
- Filtering and Grouping Records
- Tour a Grid

The Landing Page

When you first launch an application, like the Part Advisor, the landing page displays. This page is a grid that automatically populates with a first set of records.

As you scroll down, more records populate the grid. Keep scrolling down to add the records you want to see.

Some values in the columns can link to other applications. This Group column has these links.

Right-click a group value. A link to Product Group Entry displays on a context menu.

Tap this link and Product Group Maintenance displays.

Use this application to see details about each product group. Some values will have several choices in the context menu so that you can navigate to related information throughout the system.

Let's return to the Part Advisor. Use the bottom scroll to see more columns. When you scroll in the Part Advisor, you'll see several, like the Track Lots, Quantity Bearing, and Heat Number columns.

Adjusting Columns

Now select a part to see more features on other grids. Tap the 516FW part.

This opens the Details card. Here you see that this is a flat washer part that you company purchases.

Select the Activity link. Several cards contain part information. Because you want to see the stocked quantities of this part, you expand the On Hand? card.

You can hide some columns and change their sequence as well. Tap the card's Overflow icon and select Personalize Columns.

The Personalize Columns pane opens. Toggle off the columns you don't want to see, like the Transform Order Allocated Quantity, Transfer Order Picking, and Transfer Order Picked columns.

To change the column's sequence, drag the column's box to a new location in the sequence. You can move the On Hand and Unit of Measure columns higher in the sequence like this, so they are next to the Bin column.

Now tap Save. The Personalize Columns panel closes.

The columns appear in your customized sequence, and the transfer columns are gone.

Filtering and Grouping Records

One way you filter records is by selecting an option from this drop-down list here, near the top of its card. Right now, it shows the ALL option.

Some applications have a list of prebuilt options that you can select here. But you can also link a business activity query, or BAQ, to this list. You then customize what results display in this grid.

To learn about creating BAQs and attaching them to drop-down lists, review the Application Studio and Business Activity Query help and courses.

You can also filter the grid's records using its columns. Tap on the Funnel icon.

Now each column has a field and a funnel icon below it. Tap in the field below the Warehouse header and enter FST. Now only the part listing for the Floor Stock - Main warehouse appears.

Clear this value from the Warehouse field. All the entries display again.

Tap the Funnel icon next to the Warehouse. The "is equal to", "is not equal to", "contains", and other options show on a selection list. Select the "is not equal to" option.

Now enter the FST value in the Warehouse field again.

The Floor Stock - Main warehouse entry no longer displays on the grid, but the other warehouse entries do.

To see the Group By feature, let's clear the values from this column.

Just above the grid, there's an area where you can drag the column headers. Drag the Warehouse column up there.

All the records group together by warehouse. Expand the Floor Stock - Main node.

Let's group by another column. This time, drag Bin to the Group By area.

Now the rows group first by Warehouse and then by Bin. When you expand the Floor Stock - Main node, the records are further grouped by their bins.

The Group By Feature makes it easy to find the records you need.

Tour a Grid

Use grid features to filter what records appear in their rows. Tap the dots to review what each feature does.

Filter records by selecting an option from this drop-down list. Some grids have prebuilt options, but you can also add custom business activity queries, or BAQs, to this list.

Tap the Funnel icon to see the funnel row and the Group By area. This funnel row displays below the column headers.

When you activate the card's Funnel icon, this Group By area displays. Drag column headers into this area. The grid then groups rows by the columns you select.

You can change the sequence in which columns appear on the grid. Tap the Overflow icon and select the Personalize Columns option.

When you activate the card's Funnel icon, you can use these fields to limit what records display in the rows. You can also tap the column's Funnel icon to select options like "is equal to", "is not equal to", and "contains."

Recap

That's the end of the course. Let's review what you learned about grids.

You first saw how to find records on the Landing Page. When applications launch, they have a grid on this page that you use to see specific records.

You then learned how to adjust grid columns to see the information you need.

Next the course showed how filtering and grouping records organizes what information displays in the grid.

The course ended with a tour. You explored where you find features on a grid.

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