Veco User Guides –

Grids, Views, and Grid Reports

Introduction

A “Grid” is defined as being a list of data records presented to the user.

A grid is shown generally when an option is selected from the “Tree Menu” or as when a “Related Details” tab is selected from the lower section of a details form.

The data records are arranged in columns and rows where each row represents a unique record item, and each column represents a unique field from the record.

A grid can be manipulated in various ways to present the information in a particular format, from which the information can be printed as a report, exported, or used as the basis for a particular function such as mail merge.

This document will explain the main features available on each grid.

Grid Functionality – Main Features

From a grid it is possible to:

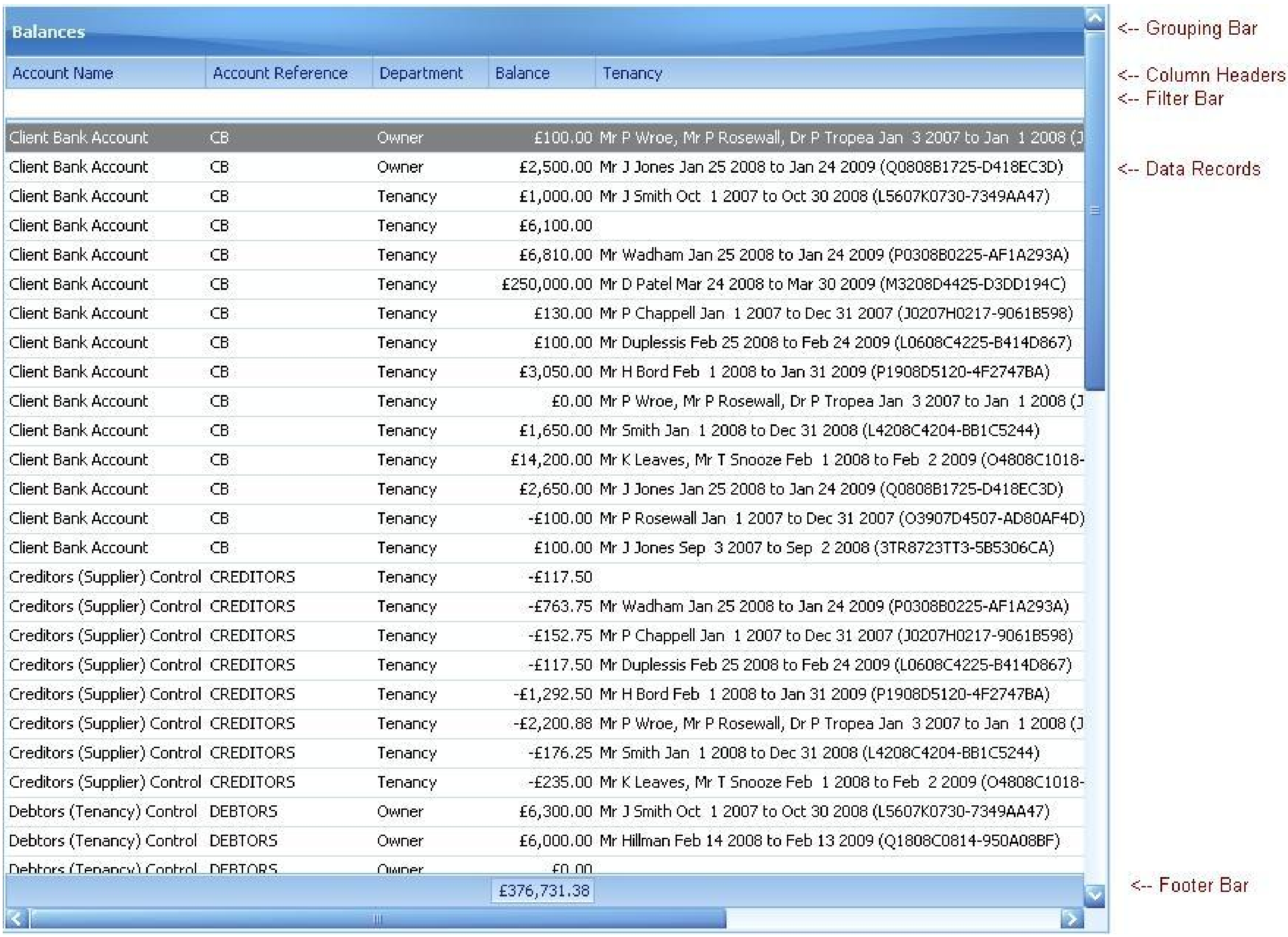
- Group Rows
- Sort Rows
- Filter Rows
- Hide Columns
- Lock Columns
- Print, E-mail & Save Reports
- Produce Charts

Additionally, a “Right-Click” context-sensitive menu will allow some additional functionality:

- Set Grid Layout
- Set grid as the “Home” page
- Create “Views”
- Send Email & SMS
- Make New Appointments
- Select Multiple Rows
- Export Data

Typical Grid Layout

The screenshot below shows the main sections of a typical grid:



Balances

Account Name	Account Reference	Department	Balance	Tenancy
Client Bank Account	CB	Owner	£100.00	Mr P Wroe, Mr P Rosewall, Dr P Tropea Jan 3 2007 to Jan 1 2008 (J
Client Bank Account	CB	Owner	£2,500.00	Mr J Jones Jan 25 2008 to Jan 24 2009 (Q0808B1725-D418EC3D)
Client Bank Account	CB	Tenancy	£1,000.00	Mr J Smith Oct 1 2007 to Oct 30 2008 (L5607K0730-7349AA47)
Client Bank Account	CB	Tenancy	£6,100.00	
Client Bank Account	CB	Tenancy	£6,810.00	Mr Wadham Jan 25 2008 to Jan 24 2009 (P0308B0225-AF1A293A)
Client Bank Account	CB	Tenancy	£250,000.00	Mr D Patel Mar 24 2008 to Mar 30 2009 (M3208D4425-D3DD194C)
Client Bank Account	CB	Tenancy	£130.00	Mr P Chappell Jan 1 2007 to Dec 31 2007 (J0207H0217-9061B598)
Client Bank Account	CB	Tenancy	£100.00	Mr Duplessis Feb 25 2008 to Feb 24 2009 (L0608C4225-B414D867)
Client Bank Account	CB	Tenancy	£3,050.00	Mr H Bord Feb 1 2008 to Jan 31 2009 (P1908D5120-4F2747BA)
Client Bank Account	CB	Tenancy	£0.00	Mr P Wroe, Mr P Rosewall, Dr P Tropea Jan 3 2007 to Jan 1 2008 (J
Client Bank Account	CB	Tenancy	£1,650.00	Mr Smith Jan 1 2008 to Dec 31 2008 (L4208C4204-BB1C5244)
Client Bank Account	CB	Tenancy	£14,200.00	Mr K Leaves, Mr T Snooze Feb 1 2008 to Feb 2 2009 (O4808C1018-
Client Bank Account	CB	Tenancy	£2,650.00	Mr J Jones Jan 25 2008 to Jan 24 2009 (Q0808B1725-D418EC3D)
Client Bank Account	CB	Tenancy	-£100.00	Mr P Rosewall Jan 1 2007 to Dec 31 2007 (O3907D4507-AD80AF4D)
Client Bank Account	CB	Tenancy	£100.00	Mr J Jones Sep 3 2007 to Sep 2 2008 (3TR8723TT3-5B5306CA)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£117.50	
Creditors (Supplier) Control	CREDITORS	Tenancy	-£763.75	Mr Wadham Jan 25 2008 to Jan 24 2009 (P0308B0225-AF1A293A)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£152.75	Mr P Chappell Jan 1 2007 to Dec 31 2007 (J0207H0217-9061B598)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£117.50	Mr Duplessis Feb 25 2008 to Feb 24 2009 (L0608C4225-B414D867)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£1,292.50	Mr H Bord Feb 1 2008 to Jan 31 2009 (P1908D5120-4F2747BA)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£2,200.88	Mr P Wroe, Mr P Rosewall, Dr P Tropea Jan 3 2007 to Jan 1 2008 (J
Creditors (Supplier) Control	CREDITORS	Tenancy	-£176.25	Mr Smith Jan 1 2008 to Dec 31 2008 (L4208C4204-BB1C5244)
Creditors (Supplier) Control	CREDITORS	Tenancy	-£235.00	Mr K Leaves, Mr T Snooze Feb 1 2008 to Feb 2 2009 (O4808C1018-
Debtors (Tenancy) Control	DEBTORS	Owner	£6,300.00	Mr J Smith Oct 1 2007 to Oct 30 2008 (L5607K0730-7349AA47)
Debtors (Tenancy) Control	DEBTORS	Owner	£6,000.00	Mr Hillman Feb 14 2008 to Feb 13 2009 (Q1808C0814-950A08BF)
Debtors (Tenancy) Control	DEBTORS	Owner	£0.00	
			£376,731.38	

A grid is divided into five main sections:

1. Grouping Bar
2. Column Headers
3. Filter Bar
4. Data Records
5. Footer Bar

Each section provides certain functionality, and can be manipulated using a “context menu” available by using the right-click mouse button on each section.

Grouping Bar

The grouping bar enables you to group data against one or more columns. If you group data by a column, records with identical column values are arranged into corresponding data groups. The resulting group rows can be expanded to access the underlying data records.

It is possible to group by another column, when the data rows within each group are combined into second level groups according to the new grouping column's values.

A user can group data by a particular column by dragging its header from the column header section onto the grouping bar. To ungroup the data, remove the column header from the group panel by dragging it back to the column header section. You can also change the order of the grouping columns using drag and drop.

It is also possible to group data by a column by selecting the "Group By This Field" option from the column header context menu which can be accessed by right-clicking anywhere on the column header section. To ungroup data, use the "UnGroup" option from the same menu or choose "Clear Grouping" from the grouping bar context menu. Records are always sorted against the grouping columns. If you group data against a column which isn't sorted, the grid control will automatically apply sorting in ascending order to the column. Subsequently, if you remove the column from the group panel its sort settings will be cleared.

When grouping has been applied each grouped row can be "expanded" to show each data record within the group, or "collapsed" to reduce the expanded section to a single row. Each grouped row will normally show how many data records are contained within the group.

Column Headers

Column headers represent unique data fields within the data records.

Using the column headers, records can be sorted and filtered to show certain types of record.

Sorting Records by Columns

To sort data against a grid column or to change the column's sort order, a user can click its column header. The column's current sort order is indicated by a small arrow displayed at the column header's right edge. If the data is sorted in ascending order, an up-arrow is shown. When sorting in descending order, a down-arrow is shown. If the column isn't sorted, no arrow is shown.

Multiple columns can be sorted by holding the SHIFT key while clicking a column header.

A column's sorting can be cleared by holding the CTRL key while clicking a column header.

Columns can also be sorted by using the right-click context menu on any column header.

Filtering Records using Column Headers

In a grid, a user can apply, change or remove filtering via a column's "filter button". This is shown as a very small button that displays when you hover the mouse over any column. Clicking it invokes a "dropdown list" which by default contains the predefined ((All), (Custom), (Blanks) and (Non Blanks)) values along with the values of items within that column. At the top of the list the most recently used filter conditions are displayed.

To filter a grid so that only certain records are shown, simply choose a value from the dropdown list.

Moving Columns

The order of the columns can be changed by dragging and dropping a column from one position to another. Note that moving a column is not permanent. The original column order will be re-instated when switching to a different grid and back. Column order can be saved permanently by using the "Set Grid Layout" options on the right-click context menu.

Removing Columns

If certain columns do not need to be displayed they can be removed completely from the grid by dragging them off the column header bar. A big black **X** will be shown over the column as it is being dragged, to indicate that the column is being removed from the grid.

Note that removing a column from the grid is not permanent. The original columns will be re-instated when switching to a different grid and back. Columns can be saved permanently by using the "Set Grid Layout" options on the right-click context menu.

Restoring Columns

If columns have been removed they can be restored by using the "Column Chooser" option from the right-click context menu from the column header bar. A "Customisation" window will appear containing the names of any removed columns plus any additional columns available.

To restore a column, simply drag the column from the customisation window to the position in the column header bar where you wish the column to appear.

Resize Columns

The width of any column can be changed by holding the left mouse button when the mouse is positioned between any column headings. Then move the mouse left or right to resize the column to the left.

Columns can be automatically sized by using the "Best Fit" and "Best Fit (all columns)" options from the column header right-click context menu.

Lock Columns

Some grids can display quite a large number of columns which can be scrolled left and right. However, when scrolling to the right you may lose relevant columns at the beginning of the rows.

To prevent this, it is possible to "lock" any column(s) to the left of the grid and then only scroll the remaining columns.

To lock (or unlock) a column, use the "Lock Column" option from the right-click context menu from the required column header.

Filter Bar

The filter bar row on the grid allows “automatic row filtering” on the fly – by typing text directly into a column on the row.

When a user enters text within the row a filter condition is automatically created based upon the values entered and applied to the chosen column.

For example, in a column headed “Surname” if you type “s”, the grid will immediately only show data records where the surname begins with the letter “s” or “S”. Type “m” and the grid will only display data records where the surname begins with “sm”, and so on.

It is important to remember that data records are filtered on the basis that the column data begins with the characters entered. In other words if you type the words “high road” in an address column the grid will only show records where the address begins with the words “high road”. Obviously, this is not likely to return any matching records!

To resolve this issue, it is possible to use a “wildcard” symbol to indicate that you wish the filter records where the characters you enter are contained anywhere in the selected column data. This “wildcard” symbol is a percentage symbol “%”.

So, to find any address containing the words “high road” simply type it as “**%**high road”.

Another example is with the “Owner” column on the “Owner Group” grid:

Every “Owner” field is shown in the column as the name of the owner within brackets. Thus, an owner called “John Smith” might be displayed as “(John Smith 100%)”. (The 100% means that the owner owns 100% of all the properties in that owner group)

To search this particular column you must remember to enter “%smith” to find all owners containing the word “smith”.

Most Recently Used (MRU) Filters

When any filter is applied the details of the filter are shown in the “Footer Bar” at the bottom of the grid.

A filter can be switched on or off by using the tick alongside the details.

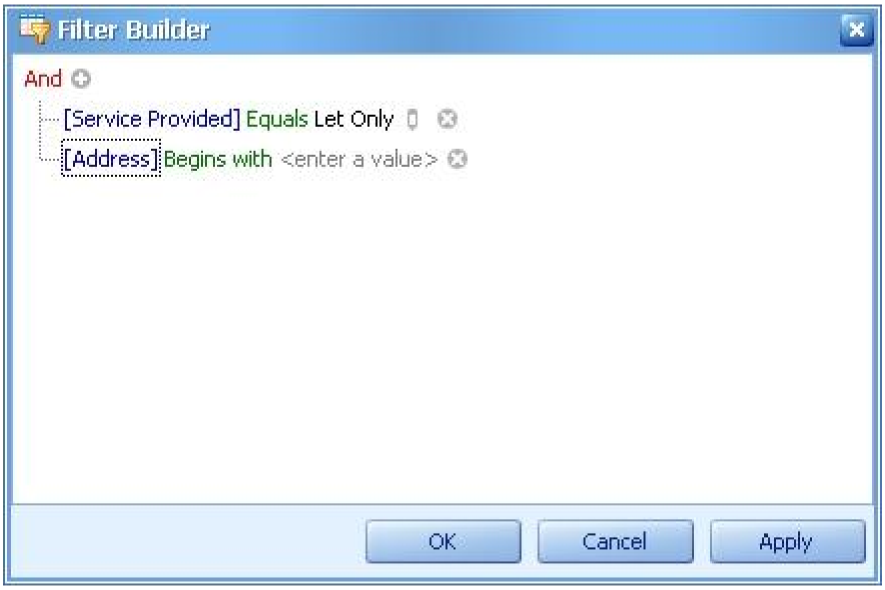
If more than one filter is used during the same session on the grid, a dropdown list of the previous filters can be seen.

Please note that these filters are lost when switching to a different grid.

Complex Filtering

Detailed filtering can be defined by using the “Filter Builder”.

This can be opened by using the “Filter Editor” option on the right-click column header context menu, or by clicking the “Edit Filter” button at the end of the footer bar when a current filter has been set.



On each line of the filter click the field names drop-down, shown in blue, to display a list of available fields that can be used in the filtering.

Click the middle (green) area to display a list of the conditions that can be applied to the chosen field.

Type the actual condition in the field to the right of the condition.

Click “Apply” to immediately see the results of the filter.

Data Records

This area of the grid shows the individual records or the grouping rows that can be expanded into individual records.

To open up the full details of a particular record double-click on the row. (Note that "Form Security" may determine if full details are allowed to be opened by certain users.)

Within the data records section of the grid additional functions are available from the right-click context menu:

Set Grid Layout

When moving columns or removing columns from the column header bar the results are not permanent and will return to their original settings when switching to a different grid.

To save the changes permanently use the "Set Grid Layout" option from the right-click context menu which appears when you right-click anywhere on the data records.

These options will only be shown if your "User Details" allow you to "Save Custom Grid Layout". Generally, only administrators or managers should be allowed to use this facility. Two options are available:

- Set Grid Layout as Personal Default

This will allow you to save the layout for your own personal use.

- Set Grid Layout as Department Default

This will allow you to save the layout so that everyone in the same department sees the grid in the save format.

Note that a personal default will override the department default.

Set grid as the "Home" page

If a particular grid is used most commonly, it can be assigned as your "Home" page. A "Home" button on the top toolbar can be clicked at any time to return to the designated home page.

The "Home" page is assigned to individuals and not by department.

Create "Views"

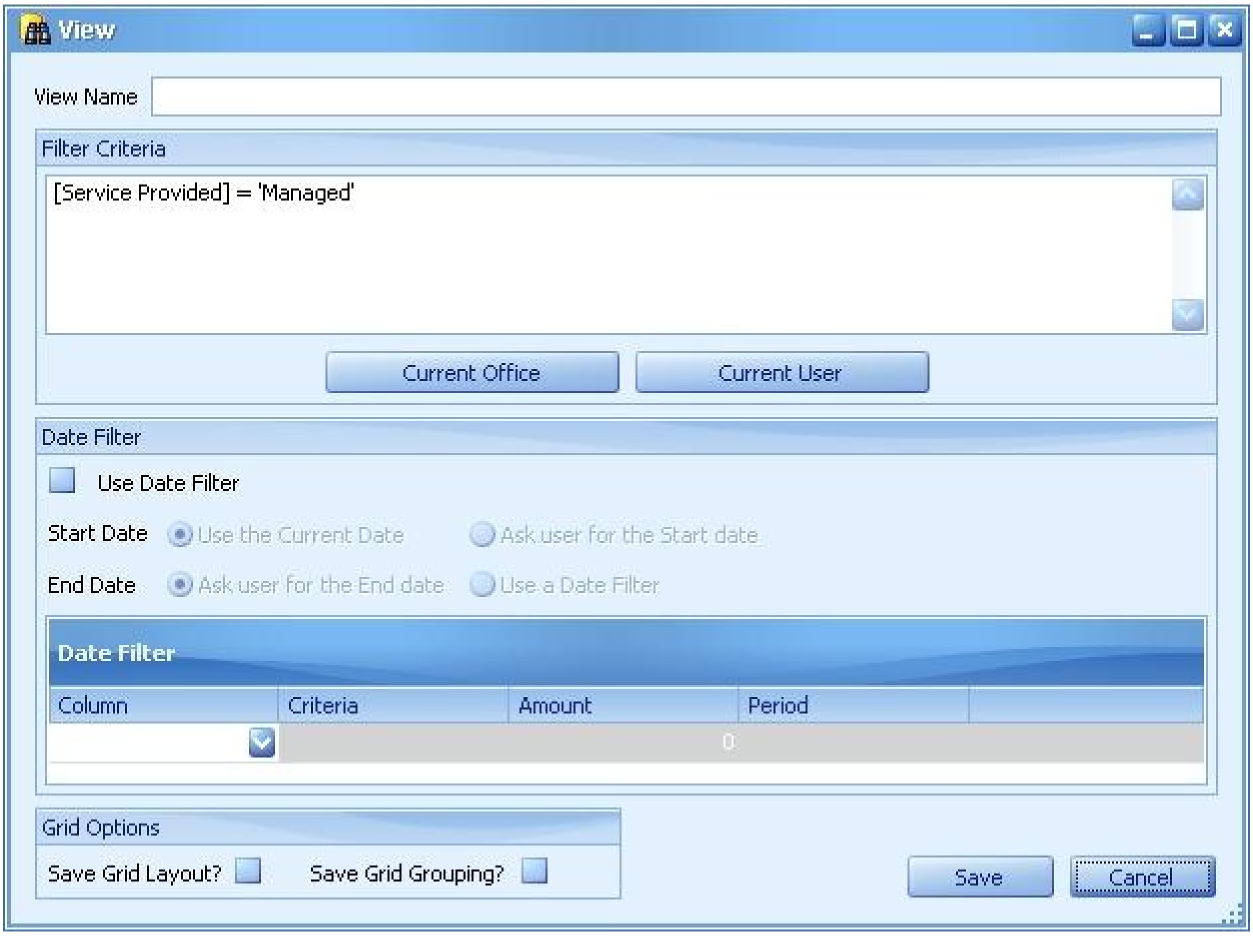
"Views" are permanently stored grid filters.

Generally, when grids are manipulated by moving/removing columns; by setting filters; or by grouping by columns, the results are not permanent and will return to their original settings when switching to another grid.

To save the results permanently it is possible to create a "View" so that the columns and filters do not have to be configured each time.

For example, a property manager may generally only deal with "Managed" properties, and therefore would normally filter the "Service Provided" column to only show "Managed" records. To save this permanently a view can be created called "Managed Properties".

Choose "Create View" from the right-click context menu to display the following window:



Now, enter a name for the view and click “Save”.

“Saved” views can be recalled at any time from the “Views” list at the very bottom of the main “Veco” screen.

NB: Saving a view does not save the data, only the grid layout. The data will always be current.

- Current Office and Current User

When filtering by an office or a user name the “Create View” window will show the actual office and user name selected in the “Filter Criteria” section. To ensure that every user can use the view in the future, highlight the office or user name (including the single quotes) and then click “Current Office” (or “Current User”). When the view is selected the grid will then show the grid based on the name of the user (or office of the user) who is logged on.

- Date Filter

When a view needs to contain a filter based on dates, the view can be defined with a “start date” and “end date”. This is particularly useful when defining views that shown calendar appointments, or tenancy renewal dates, for example.

To use a date filter it is necessary to tick the “Use Date Filter” box in the “Date Filter” section.

Specify if the start date for the filter should always be the current date, or if the user should be prompted to enter a date when selecting the view.

Also, specify if the end date for the filter should be prompted at the time of running the view, or if the end date should be based upon the date column.

Select a date column to base the results filter and the criteria for selecting the records. This is only valid if the end date is not prompted for at the time of running the view.

- Grid Options

Optionally, it is possible to include the grid layout and any grouping when saving a view.

Send Email & SMS

This facility can be used to send e-mails and text messages to a contact highlighted on a grid. This facility is only available on certain contact grids.

When sending an e-mail, click the “To” button to choose an e-mail address from the contact’s own e-mail addresses as recorded in the contact’s “communication” details, or from a list of your own company’s users.

When sending an SMS, click the “Mobile Number” button to choose from a list of the contact’s own mobile numbers as recorded in the contact’s “communication” details.

Make New Appointments

The facility is available from some grids to allow a new appointment or diary event to be entered against the highlighted record.

Select Multiple Rows

Some grids allow the manual selection of records to be processed as part of a mail merge routine, or with some accounting procedures.

Right-click on the grid to call up the context menu and choose “Selected”. A new column will appear as the first column on the grid. Tick the required items, or click “Select All” or “Unselect All” on the top toolbar. To select all records of a particular type, filter or group the grid, and then click “Select All”. Only records that are include in the grid after filtering will be selected. All other records will not be selected.

After the relevant records have been selected, use the “Actions” menu to do a mail merge or mass e-mail, or use the “Process” button on the top toolbar.

Export Data

The grid records can be exported to an Excel (XLS) file and opened directly in Excel.

When choosing this option, select a document folder and enter a name for the Excel file. The file can be opened in Excel immediately if required.

Footer Bar

The section at the bottom of a grid is called the "Footer Bar". This will display the totals of certain columns on some of the grids, and will show any filtering conditions.

Additional functions are available for each column by right-clinking on the footer bar under each column. This will display a context menu giving the following options:

- Sum show the total of the values in the column
- Min show the smallest of the values in the column
- Max show the maximum of the values in the column
- Count show the number of records in the column
- Average show the average of all values in the column

Print, E-mail & Save Reports

The data on a grid can be printed and optionally saved as a report file.

From the top toolbar, click the “Printer” symbol.

The report will be shown in “preview” format. If any columns are sorted, moved or removed from the grid, or if the grid is filtered or grouped by a particular column, the result will appear exactly the same way on the report preview.

From here it is possible to change the header and footer text of the report; change the margins and page layout; change the background colour; and add a watermark as required.

Use the “File” menu or the icons on the toolbar to print, save, or e-mail the report.

Reports can be saved or e-mailed in a number of data formats:

- PDF (Acrobat Reader format)
- HTML (Webpage format)
- MHT (Mime HTML format)
- RTF (Word format)
- Excel (Excel format)
- CSV (Comma separated values format for import into different software)
- Text (TAB separated values format for import into different software)
- Image (Various image formats such as BMP, JPG, etc)

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