

Application Data Grids

Contents

Document Updates	1
Grid navigation.....	2
Grid Sorting and Filtering	3
Grid Filtering	4
An example of filtering a column for a specific amount:.....	5
.....	5
Grid Searching.....	6

Document Updates

Date Updated	Updated By	General Description
6/22/22	Daniel Smith	New grid and functionality.

Grid navigation

Field edit – when a field is highlighted

- Press spacebar to edit and preserve the data.
- Left click field to edit and preserve the data.

Field erase and reenter – when field is highlighted

- Press backspace to re-enter data.

Delete Key – removes the current row unless the cell (column in a row) is being edited.

Enter Key - moves to the next row keeping the cursor position in the same column.

CTRL-C copies an entire row.

CTRL-V pastes an entire row after CTRL C.

Up, down, left and right arrows move you around the grid.

- Down arrow moves to a new row if you are positioned on the last row of data.

Grid Sorting, Filtering, and Searching

Each grid in the system allows for sorting and filtering. To sort a grid, click on any column heading name. Clicking twice will cause the column to reverse the order of the sort (Ascending/Descending). You can also sort and filter the grid by clicking on the funnel beside any column heading. When you click the funnel, you can click on Ascending or Descending to sort the grid based on the column sort order. When you click the funnel, you will have two types of filtering - by Value or by Condition.

x

Clear Column Filters

Voucher #	Vendor	Descri...	Due Date	PO #	Amount	Method	Status	Bank ...	Post A/P	Hold	Action
764	CANE GAR...	Test of new...	03/02/2022		\$375.00	DirectDepo...	Not Posted	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
701	CANE GAR...	Test of new...	02/02/2022		\$500.00	DirectDepo...	Ready for Payment	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
700	CANE GAR...	Test of new...	02/16/2022		\$375.00	DirectDepo...	Ready for Payment	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
789	EXXON SER...	Several tan...	06/24/2022		\$600.00	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
766	EXXON SER...	Several tan...	05/24/2022		\$458.69	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
746	EXXON SER...	Several tan...	04/24/2022		\$600.00	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
745	EXXON SER...	Several tan...	05/24/2022		\$458.69	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
744	EXXON SER...	Several tan...	04/24/2022		\$458.69	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
743	EXXON SER...	Several tan...	03/24/2022		\$600.00	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
742	EXXON SER...	Several tan...	04/24/2022		\$458.69	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
741	EXXON SER...	Several tan...	03/24/2022		\$458.69	DirectDepo...	Ready for Payment	Wachovia -...	<input type="checkbox"/>	<input type="checkbox"/>	
763	Cane Gard...	Monthly Su...	02/09/2022		\$250.00	DirectDepo...	Not Posted	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
762	Cane Gard...	Monthly Su...	01/09/2022		\$300.00	DirectDepo...	Not Posted	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
761	Cane Gard...	Monthly Su...	01/09/2022		\$250.00	DirectDepo...	Not Posted	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
699	Cane Gard...	Monthly Su...	01/09/2022		\$250.00	DirectDepo...	Ready for Payment	Wachovia -...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Include completed vouchers in list

Total Rows: 38
Selected Rows: 1

Grid Filtering



When you click the funnel, a popup page similar to Excel is displayed:

[Filter by Condition](#) | [Filter by Value](#)

Search

Select All

- CC00
- CSBG
- CV00
- DT00
- HD00

[Filter by Condition](#) | [Filter by Value](#)

Show items where the value

(not set) ▼

And
 Or

(not set) ▼

Filter By Value allows you to Select All values or select one or more values in the column. You also have a search box to search for the values you may want to select.

[Filter by Condition](#) | [Filter by Value](#)

Show items where the value

(not set) ▼

And
 Or

(not set) ▼

Filter by Condition allows you to enter criteria for filtering the data. You can enter a beginning value and an ending value with “And” – “Or” conditions.

Show items where the value

(not set) ▼

(not set)

- Equals
- Does not equal
- Is Greater than
- Is Greater than or equal to
- Is Less than
- Is Less than or equal to

An example of filtering a column for a specific amount:

Amount
Method
Status

↑ Ascending
↓ Descending

[Filter by Condition](#) | **Filter by Value**

Show items where the value

Equals

\$250.00

And Or

(not set)

Apply
Cancel
Clear

Vouchers

x

[Clear Column Filters](#)

Voucher #	Vendor	Descri...	Due Date	PO #	Amount	Method	Status	Bank A...	Post A/P	Hold	Action
763	Cane Garde...	Monthly Su...	02/09/2022		\$250.00	DirectDepo...	Not Posted	Wachovia - ...	<input type="checkbox"/>	<input type="checkbox"/>	
761	Cane Garde...	Monthly Su...	01/09/2022		\$250.00	DirectDepo...	Not Posted	Wachovia - ...	<input type="checkbox"/>	<input type="checkbox"/>	
699	Cane Garde...	Monthly Su...	01/09/2022		\$250.00	DirectDepo...	Ready for Payment	Wachovia - ...	<input type="checkbox"/>	<input type="checkbox"/>	
696	Cane Garde...	Monthly Su...	12/09/2021		\$250.00	DirectDepo...	Ready for Payment	Wachovia - ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

You can also filter for greater than or less than or for a particular range of amounts.

Grid Searching

You can search for any row of data in any grid by entering a value in the “Search” box at the top of each grid. The grid will automatically filter based on the search value:

 ×

You can also search each individual column by clicking in the column and start typing a value.

IMPORTANT

There is one important thing about searching for amounts in a grid. Because the grid contains data in a text format, you must enter the amount you search for with the dollar sign \$ and the commas and the period in the amount. For example to search for 50245.33 you would type \$50,245.33 in the search box.

The grid has the number of Total Rows and Selected Rows at the bottom right of the grid. The Total Rows number will change based on filters you set and searches you execute.

General Ledger Maintenance												
Search <input type="text" value=""/>												Clear Column Filters
Code	Number	Date	Description	Vendor	Business Entity	Fiscal Year	Cost Center	Sub-cost Center	Account	Debit	Credit	
JE	182	02/24/2022	Test		CC00				4000	\$3,900.00	\$0.00	
JE	162	01/24/2022	test		CC00				1004	\$0.00	\$10,000.00	
JE	182	02/24/2022	Test		CC00				1004	\$0.00	\$3,900.00	
JE	184	02/27/2022	Second test Balanced...		CC00				1004	\$10,000.00	\$0.00	
CA	66	05/12/2022	Indirect Cost Allocati...		CC00	CC22			1000	\$0.00	\$1,980.00	
CA	67	05/12/2022	Indirect Cost Allocati...		CC00	CC22			1000	\$0.00	\$1,980.00	
CA	69	05/12/2022	Indirect Cost Allocati...		CC00	CC22			1000	\$0.00	\$1,980.00	
CR	152	02/20/2022	Grant Revenue		CC00	CC22			4000	\$0.00	\$100.00	
CR	152	02/20/2022	Grant Revenue		CC00	CC22			4000	\$0.00	\$2,500.00	
JE	184	02/27/2022	Second test Balanced...		CC00	CC22			4000	\$0.00	\$10,000.00	
JE	162	01/24/2022	test		CC00	CC22			5000	\$10,000.00	\$0.00	
PR	55	01/19/2022	Payroll January		CC00	CC22			5000	\$1,000.00	\$0.00	
PR	55	01/19/2022	Payroll January		CC00	CC22			1002	\$0.00	\$1,000.00	
CR	152	02/20/2022	Grant Revenue		CC00	CC22			1004	\$2,600.00	\$0.00	
CA	69	05/12/2022	Indirect Cost Allocati...		CC00	CC22			5999	\$1,980.00	\$0.00	
CA	65	05/12/2022	Indirect Cost Allocati...		CC00	CC22			4001	\$1,980.00	\$0.00	
CA	66	05/12/2022	Indirect Cost Allocati...		CC00	CC22			4001	\$1,980.00	\$0.00	

Total Rows: 280
Selected Rows: 1