

View Grids

The system includes a powerful data-grid which allows viewing, searching, grouping and sorting of data it is similar to Excel, but in certain ways more powerful.

An important difference to Excel is that the main View Grids in the system are read-only. It is not possible to edit data in them. The reason for this is that system data is complex, and should always be edited within system Edit Forms. Editing data via Edit Forms allows complex data-structures and validation processes to be done, and provides useful tools for managing data. This is not possible when data is edited directly in a general purpose view-grid.

Key Features of View Grids

- Data is "Asynchronous". Remember Orixa is a multi-user system. The Grid-view will always show a fully accurate list of all the data in the database at the time the Grid-search is run. However in a larger system multiple users may be adding and editing data at any moment so a database is never static. For this reason a Grid-view may not be fully up-to-date. To be sure they are looking at the most up-to-date data, the user can always "refresh" the grid-view and see whether the data changes.
- View grids include multiple features to enable rapid location, viewing & summary of data, making them extremely powerful. Users will need a small amount of training to understand how to do this.
- Many aspects of the operation of View Grids are copied from general features of Windows. For example, if you select a number of rows of data in a grid and click "CONTROL + C" (the general command for "copy"), the selected rows will be copied into the computer clip-board and can then be pasted into any other program.

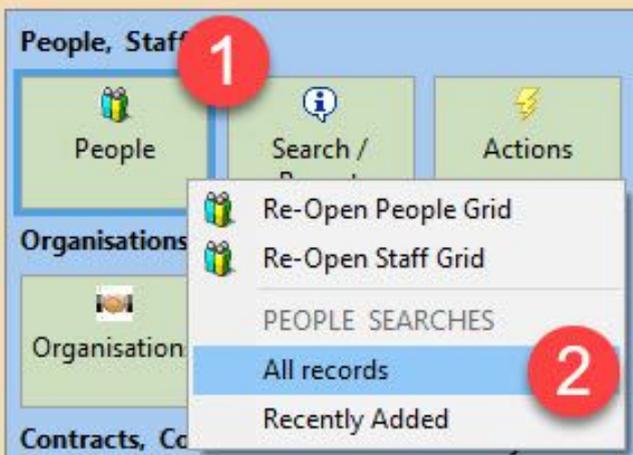
ID	Intern	ShortName	Customer	Name	DateStart	DateEnd	HoursWorked	BudgetValue	BilledValue
29919	<input type="checkbox"/>	C-10014-ash			01/01/2020	01/12/2020	38	1,500.00	14,040.00
102891	<input checked="" type="checkbox"/>	IC-10038-bre			04/2022	10/04/2023	4.5	0.00	0.00
10338	<input checked="" type="checkbox"/>	IC-1002-DrB			01/01/2017	31/12/2018	60.33	3,360.00	3,424.80
10570	<input checked="" type="checkbox"/>	IC-1003-DrB			01/01/2018	31/12/2018	41.75	2,400.00	2,505.00
10973	<input checked="" type="checkbox"/>	IC-1004-DrB			01/01/2019	31/12/2019	52	2,400.00	2,400.00
12304	<input checked="" type="checkbox"/>	IC-1005-DrB			01/01/2020	31/12/2020	48.73	3,120.00	2,925.00
60981	<input checked="" type="checkbox"/>	IC-10024-DrB			01/01/2021	01/01/2022	416.83	14,100.00	14,565.00
97944	<input checked="" type="checkbox"/>	IC-10036-DrB			01/01/2022	01/01/2023	38.43	3,600.00	1,800.00
12577	<input checked="" type="checkbox"/>	IC-1007-ee			01/12/2019	01/01/2023	84.15	3,600.00	0.00
33004	<input checked="" type="checkbox"/>	IC-10016-ukft			01/01/2019	31/05/2021	61	0.00	0.00
92057	<input checked="" type="checkbox"/>	IC-10034-fon			01/01/2022	01/01/2023	55.25	3,000.00	0.00
20111	<input checked="" type="checkbox"/>	IC-1012-fm			01/04/2019	01/01/2025	623.01	57,000.00	49,500.00
38836	<input checked="" type="checkbox"/>	IC-10021-fm			01/01/2020	01/01/2024	111.91	11,520.00	0.00
36963	<input checked="" type="checkbox"/>	IC-10018-nc			24/06/2020	24/06/2021	2	0.00	0.00
104106	<input checked="" type="checkbox"/>	IC-10039-JAC			29/04/2022	01/10/2022	11	600.00	0.00
52094	<input checked="" type="checkbox"/>	IC-10022-jts			20/10/2020	01/04/2022	64.33	4,160.40	3,105.00
65649	<input checked="" type="checkbox"/>	IC-10026-jts			01/04/2021	01/04/2022	90.25	4,980.00	3,870.00
88218	<input checked="" type="checkbox"/>	IC-10032-nsa			01/11/2021	01/01/2022	27	15,000.00	4,200.00
69446	<input checked="" type="checkbox"/>	IC-10027-osl			01/04/2021	01/04/2022	0.5	0.00	0.00
12407	<input checked="" type="checkbox"/>	IC-10009-ox			01/12/2019	31/12/2022	1,034	0.00	0.00
22249	<input checked="" type="checkbox"/>	IC-10009-ox			01/01/2020	01/01/2023	86.25	0.00	0.00
22710	<input checked="" type="checkbox"/>	IC-10013-ox			01/01/2020	01/01/2023	47.5	0.00	0.00
36175	<input checked="" type="checkbox"/>	IC-10017-ox			08/06/2020	01/01/2023	41	0.00	0.00
36							3,629.82	137,160.40	107,714.80

View Grid: All features are described in detail below

1. Tool buttons of the main menu of the view grid.
2. Headers for the columns of data. Click on these to sort and filter the data in the grid.
3. The "Grouping Panel" which allows dynamic grouping of data.
4. The main Data-Search-box, used to return data from the database.
5. The Local-Search-box. Once data has been returned, add text here and type, the grid data will immediately show only records that match searched values.
6. The navigation bar, click the small "forward" and "back" buttons to move between records in the grid.
7. Main data area(s) note that different column-types are shown with different colours: Green for "money" fields, Gray for "numbers" and a selected color for text fields.

The functioning of all the above elements of the grid is explained below.

Accessing and using View Grids



View Grid - Opening from Entities Screen

From the main System Entities screen, find the BusinessObject you are interested in

1. Click on the icon/name. This will open a "Searches List"
2. Click on the Search you wish to open.

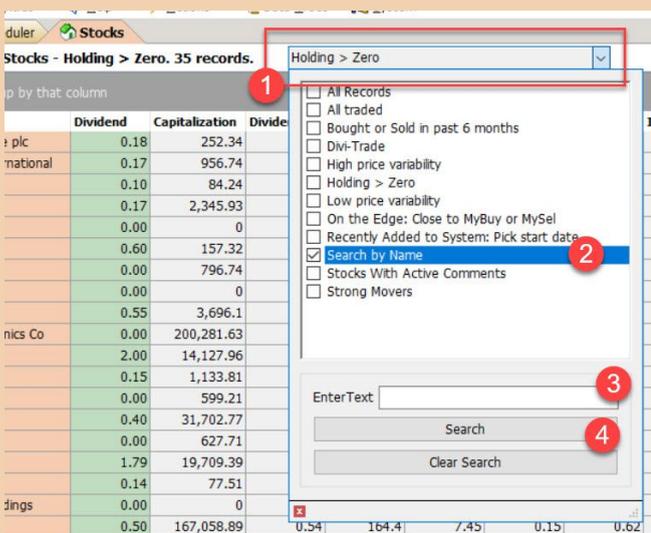
Note that the list of searches may be grouped together under multiple headings if the BusinessObject is separated into master and extension parts.

ID	Symbol	Name	Dividend	Capitalization	DividendRat	FromHyBuy	FromHySell	DivRatio	Present
36212			0.18	252.34	9.5	-36.8	57.91	2.72	
55			0.17	956.74	3.63	-68.8	84.41	1.04	
37408			0.10	84.24	12.85	-56.7	78.39	3.67	
161968			0.17	2,345.93	5.72	16.04	41.98	1.63	
165373			0.00	0	0			0	
29472			0.60	157.32	61.82	-2.95	61.18	17.66	2
15737			0.00	796.74	0	40.79	53.07	0	
164195			0.00	0	0			0	
19307			0.55	3,696.1	4.22	-78.4	87.04	1.21	

View Grid main view

The Grid-view will open, as shown in the image. If the search you have chosen includes some criteria (for example "Sales - Pick Date Range") then you may be prompted to enter some search-terms before the grid opens.

1. The name of the selected Search will be shown in the Search Selector.
2. The actual data returned will be shown in a grid. The color of different columns is set depending on the BusinessObject.
3. The Toolbar includes a number of buttons for regular actions on the grid.
4. A "Group Bar" is visible, which can be useful to manipulate data.



View Grid Search Box

The Search-Selection Box

In the main toolbar, shown at 1. in the image above you will find the "Search Selection box. If you click on the down-arrow it will open, and show a list of the searches for the current BusinessObject. This list is the same as the one that shows on the System Entities screen

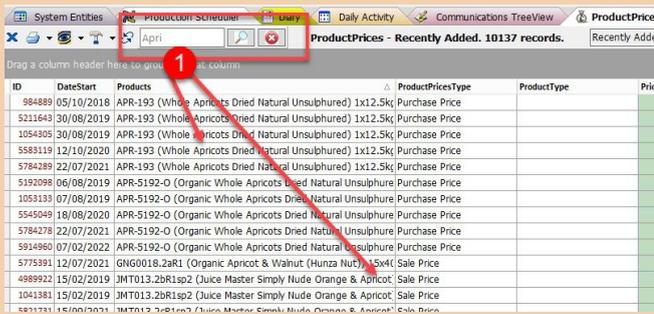
1. The search-box, click the down-arrow on the right to open.
2. Select the search you want to use
3. Fill in any criteria that are needed for the search to run, and click "Search"
4. Click "search to return data.

This will return a new set of data into the grid.

Once data is returned using the Grid Search Box, data can be further filtered using the Local Search.

Type any text in the local search box, shown at 1., in the attached image and press [Return] or click the search button.

The whole of the grid will be searched for any occurrence of the search text.

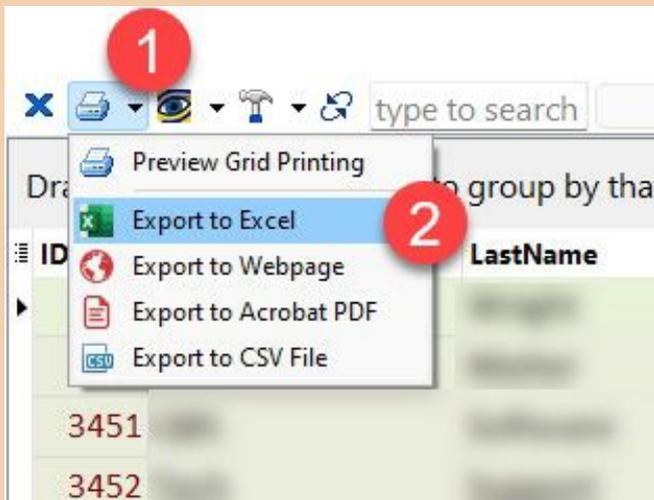


Local Search

For a more detailed topic on **searches** in the view-grid look here: [Orixa View Grid search features](#)

Note that searches can be done with numbers as well as letters. This means you can search for money amounts and also dates.

Note that when dates are searched, the local search expects the user to enter "Year-Month-Day" format, so to find the date 11/02/2022, the user would type "2022-02-11". To find all records for February 2022 the user would type "2022-02"



View Grid Toolbar Print

The "Printer" Button

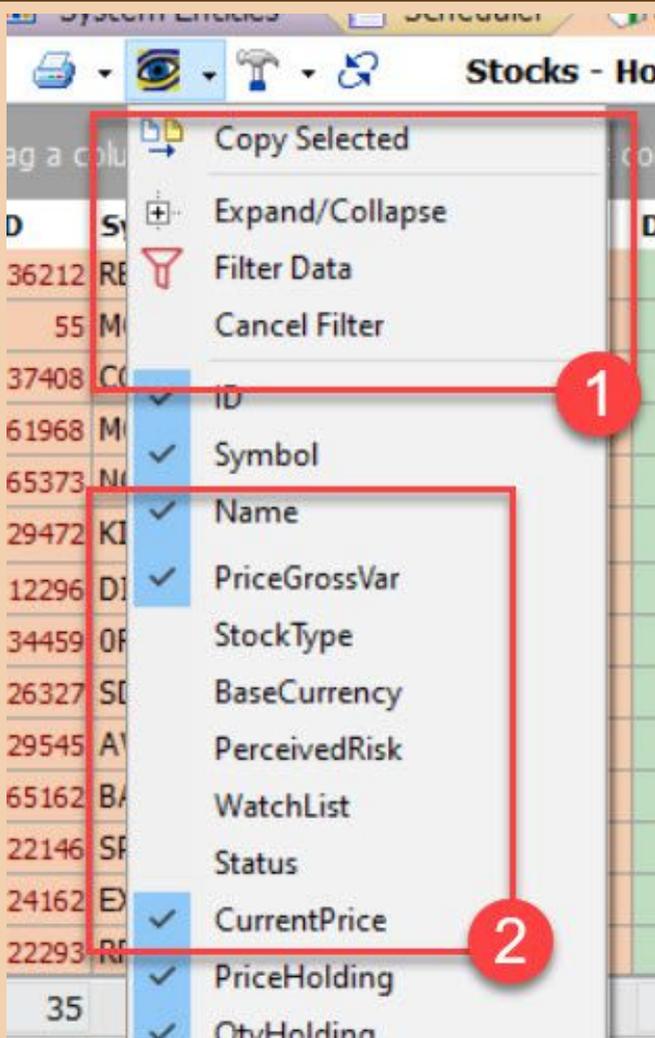
Use this button (1., in the image) to manually export any data in the view grid into a format that can be used outside of the system, such as an Excel (2. in the image) PDF or CSV file.

Note the "Preview grid Printing" button. This launches a specialized print-preview system for paper printing of the contents of a grid.

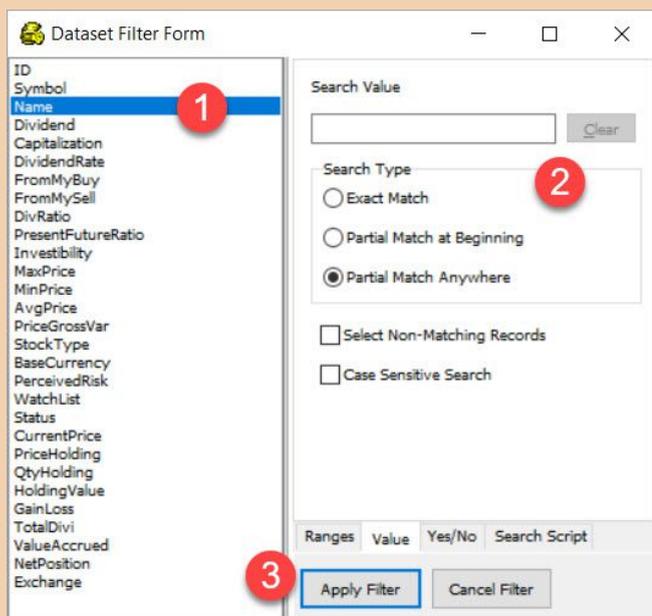
The "View" Button

This button includes a number of actions.

- Copy Selected. If any of the records in the grid view are highlighted the raw data in them will be copied so it can be pasted into another application.
- Expand Collapse. This works with the "Group Panel" which is explained below.
- Filter Data. This allows filtering of data visible in the grid, how it works is explained below.
- Visible Field List: All the fields in the Grid are then listed, with a "tick" if they are visible. Unticking any item in this list removes it from the grid-view.



View Grid Toolbar View Menu



View Grid Filter Data

The Filter-data dialog form

Access this from the "View" Button, then click "Filter Data".

This form allows more complex searches and filtering of data in the grid, for example filtering for a range of values or for part of a name.

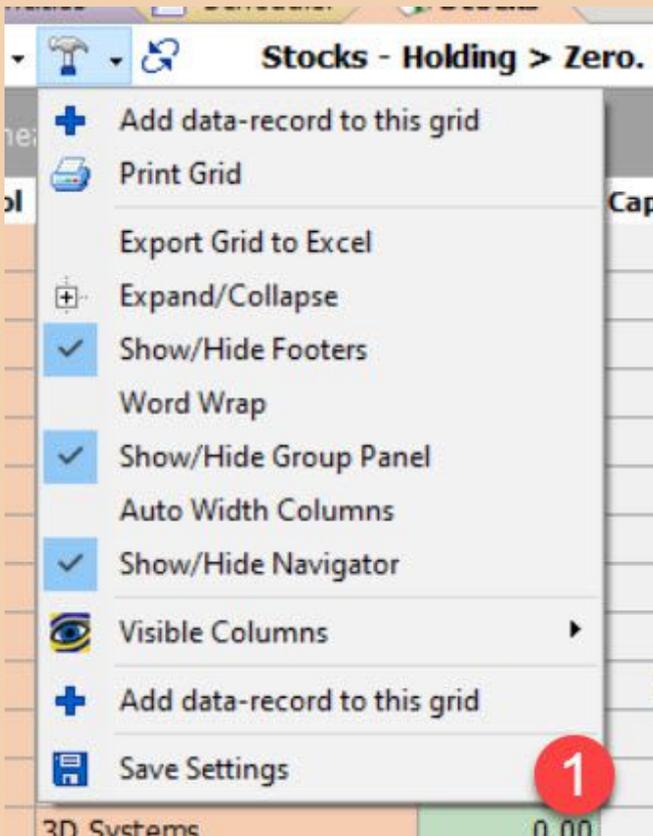
1. All the fields in the view grid are listed. Click on the one you want to search. It is possible to search more than one at a time.
2. Once you have selected a field, click on the search panel and enter the search criteria.
3. Click on "Apply Filter" to close the dialog and see the result

Note that the View button includes a "Cancel Filter" action to remove filter criteria from the data you are viewing and return to a view of all the records you have in view.

The Tools Button

This button gives access to a few commonly used settings that can be useful to change in the grid.

Most of these are self explanatory, please play with the options in this menu to get the hang of what it can do.



View Grid Toolbar Tools Menu

Note that once you have fully "set up" a grid so it shows the data you want, you can click "Save Settings" (1.) and the layout, grouping and visible columns for the grid will be saved.

Remember that you can click-and drag a number of features of the grid to change them, for example you can change the order of the columns or the width of the columns just by clicking and dragging them with the mouse.

Once you "Save Settings" all your changes including features such as whether columns are word-wrapped, column order etc., will be saved.

One "look" is saved for each "Search" and is shared by all users.

ID	Symbol	Name	Dividend	Capitalization	DividendRat	FromHyBuy	From
StockType : 0.00 0 0 0							
StockType : Aerospace and Defence 2.17 87,548.64 7.04 32.18							
161968	MGGT	Meggitt plc	0.17	2,345.93	5.72	16.04	
165162	BA	Boeing Aerospace	2.00	85,202.71	1.32	16.14	
2			2.17	87,548.64	7.04	32.18	
StockType : Business Support Services 0.49 553.08 78.27 -127.7							
36212	REDD	Redde Northgate plc	0.18	252.34	9.5	-36.8	
19089	CPI	Capita PLC	0.31	300.75	68.77	-90.9	
2			0.49	553.08	78.27	-127.7	
StockType : Buy To Let 30,000.00 0 4.62 8.33							
StockType : Construction 0.70 241.56 74.67 -59.65							
StockType : Consumer Goods 4.11 234,249.13 25.96 -96.8							
StockType : Green 1.00 38,793.99 1.14 951.75							
StockType : Manufacturing 0.00 7,027.05 0 -97.6							
StockType : Media 0.50 167,058.89 0.54 164.4							
StockType : Mining Oil Gas 0.00 22,767.02 0 -13							
StockType : Property 0.14 783.65 12.6 -62.4							
StockType : Tech and Software 2.2 879,272.77 27.9 -50.32							
StockType : Telecoms 0.02 2,207.12 3.41 17.4							
StockType : Transport Logistics 0.40 31,702.77 0.38 50.97							
StockType : Travel and Leisure 0.31 2,375.29 24.72 167.62							

View Grid Grouping

Using the "Group Panel"

One of the most powerful features of the view grid is the ability to "group" data.

This automates the creation of "headings" with the data below them.

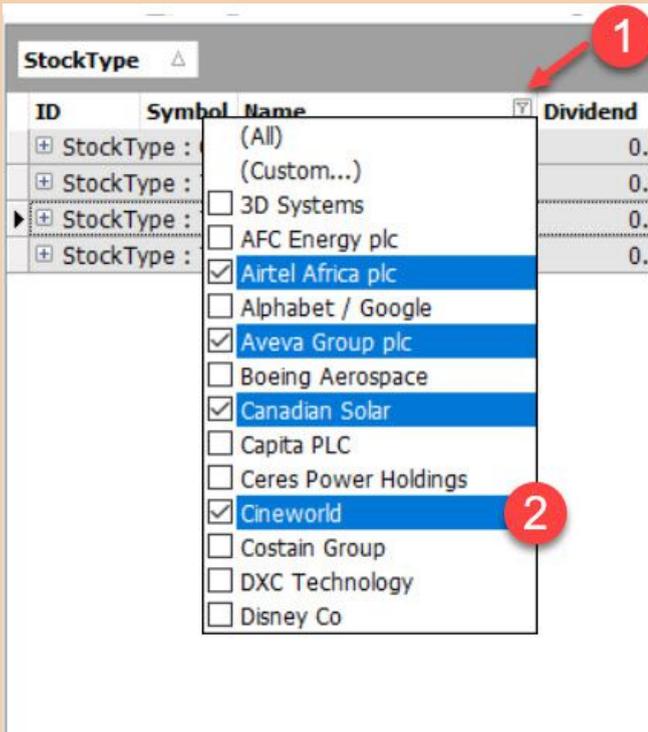
1. Click and drag a column-heading into the "Group Panel" area and the grid will be grouped by that column. Multiple columns can be grouped.
2. Once grouped all number-columns will automatically have "sum" fields added to show the total value for that group. This is extremely useful for "live analysis" of the value of different groups of data.

ID	Symbol	Name	StockType	Dividend
21054	GFRD	Galliford Try PLC	Construction	
165192	GRMN	Garmin Ltd	Consumer Goods	
21814	GNS	Genus PLC	Food and Drink	
94111	GILD	Gilead Sciences Inc	Pharma / Medical	
1	GSK	GlaxoSmithKline plc	Pharma / Medical	
17659	GLEN	Glencore Xstrata plc	Mining Oil Gas	

View Grid Incremental Search

Searching for records by typing

1. Click on any field in the grid, and start to type. In the example the text "chris" has been typed
2. The view will automatically scroll to records that match the text you have typed.



View Grid Filter from Heading

Grid Column Filtering

Each Grid-column heading includes a simple tool to allow dynamic filtering of data. This replicates a system common in Microsoft Excel, so users may already be familiar with it.

When a user hovers the mouse over a column a small arrow icon appears in the top right corner of the column, as shown in the image below. Clicking on this arrow opens a list of all the different values in this column. In the example below, the list includes Regions of Ghana. Clicking on the items in this list shows only the selected items in the grid.

An example of this can be seen marked "1." in the image on the left, where only Organisations from Abaam, Bomso and Kade have been ticked, so all other organisations have been excluded from the list.

Note that when a dynamic filter of this type is added an indication of the filter is shown at the bottom of the grid. Clicking the "(All)" option at the top of the list automatically cancels the filter, and makes all records visible in the grid.

ID	Symbol	Name	Dividend	CurrentPrice	MaxPrice	Capitalization	DividendRat	FromHyBuy
StockType : Construction			3.92	28.26	58.23	13,002.41	163	-167.71
StockType : Consumer Goods			4.76	967.95	1,085.33	234,799.79	73.8	-118.07
161638	SMSN	Samsung Electronics Co	0.00	838.74	899.96	200,281.63	0	
165192	GRMN	Garmin Ltd	2.00	73.97	78.40	14,127.96	2.7	
29599	TED	Ted Baker	0.58	1.29	22.00	57.66	45	-85.6
36642	STOK	Stock Spirits	0.07	2.46	2.52	493	2.84	64.33
26342	VFC	VF Corp	1.79	49.90	76.69	19,709.39	3.6	-28.7
26327	SDRY	Superdry	0.31	1.59	5.76	130.15	19.66	-68.1
6			4.76	967.95	1,085.33	234,799.79	73.8	-118.07
StockType : Electronics			0.11	4.99	8.14	401.48	4.69	48.33
StockType : Financial			0.43	7.75	8.91	2,089.2	5.54	55.1
StockType : Food and Drink			1.03	147.08	96.39	6,280.47	2.67	233.07
65	SAB	SAB Miller	0.70	44.53		70,446.46	1.57	78.12
99	DMND	Diamond Foods Inc	0.03	28.89		601.83	0.1	140.7
18672	ABF	Associated British Foods PLC	0.03	19.64	29.26	15,544.44	0.15	-10.7
21814	GNS	Genus PLC	0.25	32.88	36.34	2,023.44	0.76	49.45
30202	CCH	Coca-Cola HBC AG	0.02	21.14	30.79	7,664.31	0.09	-24.5
5			1.03	147.08	96.39	96,280.47	2.67	233.07
StockType : Green			3.03	192.15	210.11	41,597.84	5.98	919.24
StockType : Industrial			0.71	52.56	61.72	8,484.24	1.36	-4.44
StockType : Insurance			0.97	27.99	40.32	83.913	29.6	113.03

View Grid Complex Analysis

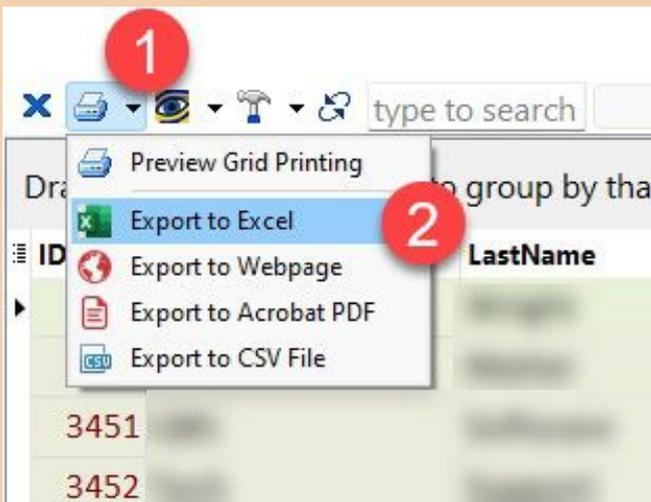
Using a grid to query financial data

1. The system has been grouped to show totals for each "StockType", allowing the user to immediately see totals for Automotive, Bankings, Insurance, Manufacturing and other stock-types.
2. "Expanding" a sub-heading shows all the items in that grouping, and gives the total values at the bottom of each group for any number or currency column.
3. Each currency column is displayed in green, and all currency columns automatically generate a sub-total within the column-heading and at the base of the sub-heading. Grid items which are "collapsed" can be seen just with their sub-totals, allowing the user to view them easily.

Extra notes relating to Excel File Export

If you want to export data in the simplest possible format that is compatible with Excel, use the "Export to CSV File" option. This generates a simple text file with "Comma Separated Values" which can be accurately opened by all versions of Excel. The CSV format ignores all formatting of data, column widths, colours etc.

If you want more control over the export process, and you want the output to include formatting and other Excel-friendly options, click "Export to Excel."



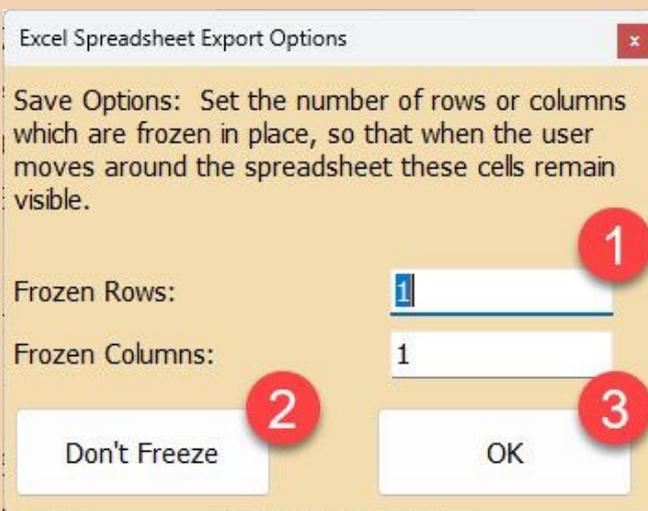
View Grid Toolbar Print

To Export a data-grid to Excel

First change the grid design so that it matches your needs. You can **filter** data to remove some rows, show or hide and change the width and position of columns, and select row-ordering by clicking a column-header.

Once this is complete:

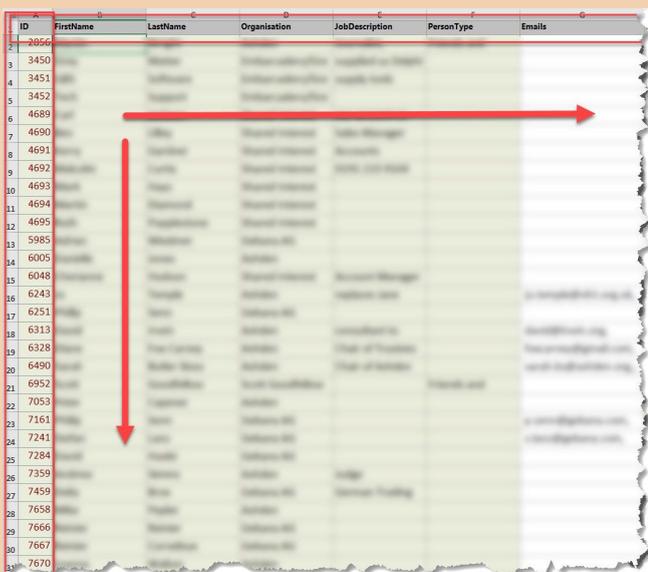
1. Click the "Print / Export" button.
2. Click "Export to Excel"



Excel Spreadsheet "freeze rows and columns" form

You will be asked to create a file on-disk, and given it a file-name. You will then be shown the "SpreadSheet Export Options" window, as shown in the image.

1. If you want some of the first rows or columns in the spreadsheet to be "frozen" so that they remain in view as the user navigates through the spreadsheet, enter numbers in these cells.
2. If you do not want any of the rows or columns frozen, click "Don't Freeze".
3. Clicking OK will close the window.



Excel file with "frozen" rows and columns

If you have chosen a file-name for the excell file, the export process should run, and once complete you will be asked whether you want to "view the resulting Excel Sheet now."

If you say "Yes" Excel should open, with your newly created spreadsheet displayed.

If you have "frozen" one row and one column, these columns (the ones marked in red in the image) should remain permanently in view as you scroll through the data.