ExpressMaintenance Version 9
Explanation of New Grids and Data Screens

The data screens in version 9 offer many new features to make organizing, viewing and editing data even easier than previous versions. Most data screens in version 9 consist of a Data Navigator Bar and a page control containing an Overview page and a Data View page.   Below is a brief description of each followed by more complete explanations. The Purchase Order screen will be used as an example.

Data Navigator - The data navigator bar consist of a row of buttons to perform various tasks from scrolling through the data records to inserting new records, filtering, searching, printing, etc.

Overview - The overview tab is used for viewing the queried data returned from the server. The data is listed in a grid with each row in the grid representing a single record. With limited exceptions, editing is not performed or allowed in the overview grid as the overview is more for searching and selecting records.

Data View - The data view tab is used for viewing and editing a single record of data. Once a record is located in the overview, you can double-click on the record or click the Data View tab to access the entire record. You will also insert new records from the data view tab.

Data Navigator Bar
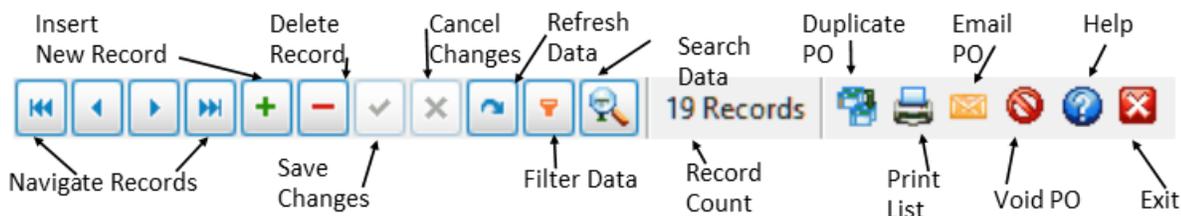The data navigator bar consist of a row of buttons to perform various functions related to the data.

Image #1 - Data Navigator Bar

Overview Page
The overview tab consist of a Data Navigator bar across the top along with a grid filled with the data returned from the initial query of the database . There are many powerful features available from the overview page as a result of the new grids in version 9. Please see Image #2 on page 2. These include:

1. Sorting - The ability to sort (Ascending or Descending) by one or more columns.
2. Grouping - The ability group the grid data in a tree format by one or more columns.
3. Searching - Defining and executing the query of data from the database to populate the grid.
4. Finding - Locating data within the columns of the data displayed in the grid.
5. Filtering - Refining or limiting the data displayed in the grid by filtering one or more columns.
6. Column Arranging - Arranging column order and enabling / disabling columns for display in the grid.
7. Footers - Adding a summary footer at the bottom of a grid to include sums, averages, etc.

The screen shot below reflects these features followed by a more comprehensive explanation of each.
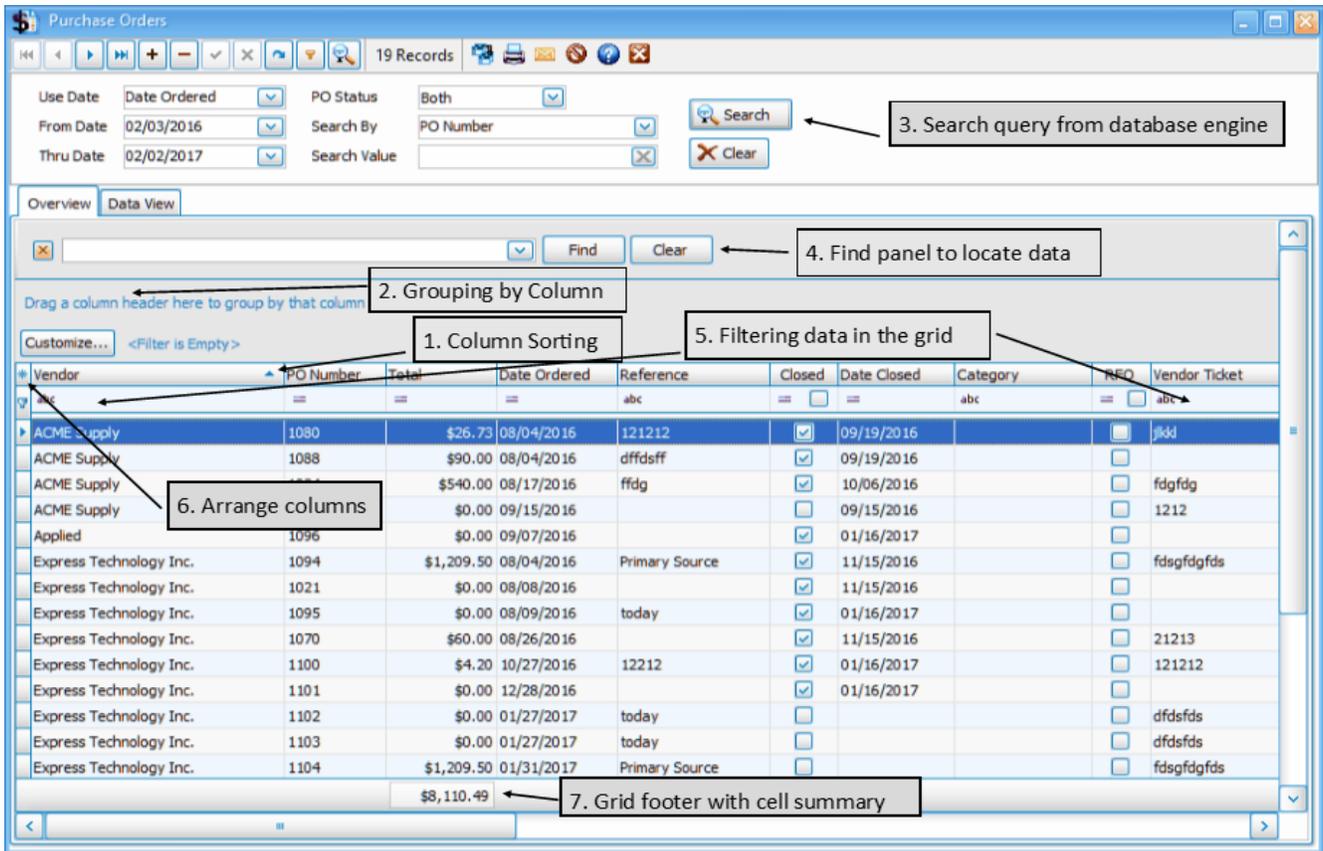

Image #2 - Purchase Order Screen

1. Column Sorting - Click on any column heading to sort the data by that column. The first click will sort by that column in ascending order. A second click will sort the data by that column in descending order. To sort by more than one column, press and hold the Shift key and click additional column headings.

2. Grouping - You can group the grid data by one or more columns by simply clicking on a column heading and dragging the heading to the group box panel. This arranges the data to be displayed in a tree layout with the ability to open and close groups as shown below in Image #3.
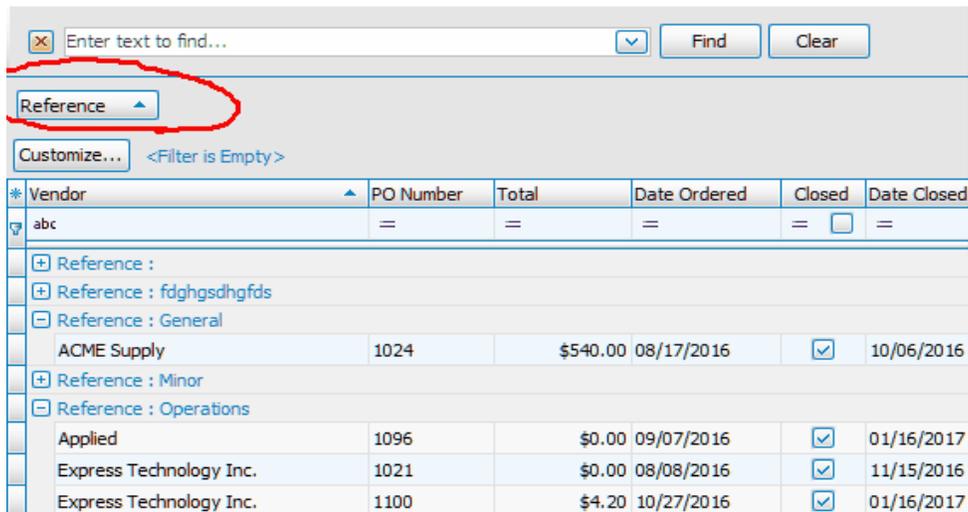

Image #3 - Grouping Example

In Image #3, the Reference column header was dragged and dropped in the Group panel, causing the grid data to be instantly grouped by the Reference field. Notice the data is now listed under Reference field group headers. You can then click on the mark left of the Reference to open or close each section.   To group by more than one column, drag a second or third column header to the group panel.
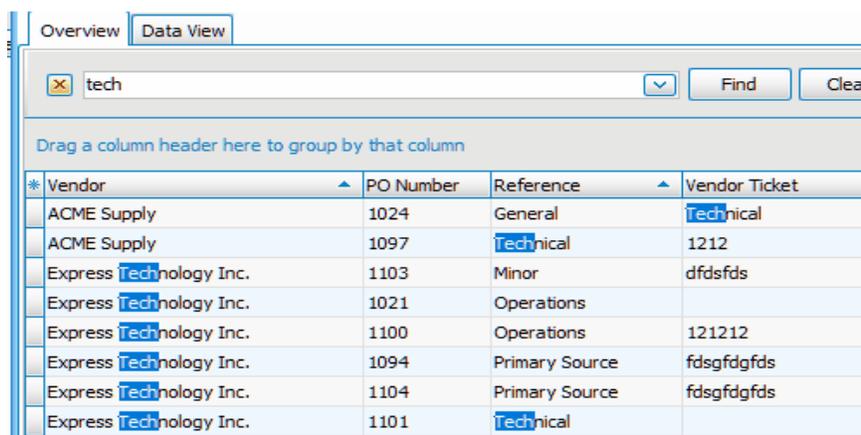
To ungroup a column, click and drag the column header from the group panel back down into the grid header in the location desired.

3. Searching - Most data screens query all records from the database engine upon opening of the screen. For situations where the number of records is moderate, the 'query all' is suitable and performance is excellent. However, some screens do not afford the ability to query all records because of the large quantity of records that would be returned. Such screens include Purchase Orders, Work Orders, Service Overview and Parts Receiving. In these cases, the program initially queries a limited amount of data based on a predefined date range as setup under Administration / Configuration / Performance settings.

In these screens, a Search Panel allows for broader or more refined queries of the database. In the search panel, you can enter a new date range or enter other specifics to query records from the database. Looking at Image #2, you will see that you can also select a field to search by and enter a search value.   This is the same functionality that existed in version 8.

So in the screens mentioned above, use the Search panel to query the desired set of data records and then if necessary, use the Find & Filter options to further locate data within the grid data. To open and close the Search panel, click the Search button in the Data Navigator Bar as shown in Image #1 on page 1. In other screens where all records are initially queried from the database, the Search button simply displays the Find Panel which is discussed next.

4. Finding - The Find Panel allows you to search the entire grid for a certain value or phrase. Find does not search the database but rather searches the content in the grid which already contains the data from the database query. The advantage to the Find option is that it searches all columns in the entire grid rather than a single column. To use the Find option, you do not need to type the entire value you or looking for. Usually just a portion of the value will do to locate the desired records.

Image #4 - Finding Data

In Image #4, you can see that the phrase 'tech' was entered in the Find panel. The program instantly searches the grid data and locates all columns in all records where the phrase appears. In this example, the phrase 'tech' was found in the Vendor, Reference and Vendor Ticket columns. The Find feature is a great way to quickly locate records and columns meeting your desired search criteria.

The Find panel automatically displays when you click the Search button in the Data Navigator Bar. It can also be accessed by pressing Ctrl-F in the grid or by right clicking on any column heading and selecting Find Panel from the popup menu.

5. Filtering - The Filtering option is an even more flexible and powerful way to search the grid data. Filtering differs from Finding in that Filtering only works on the column(s) to which you apply a filter. Also, filtering allows for much more than just finding matching text as it includes options for '=. >, <, <>, contains, ends with, begins with', etc. Image #5 reflects the assortment of filter operators available.
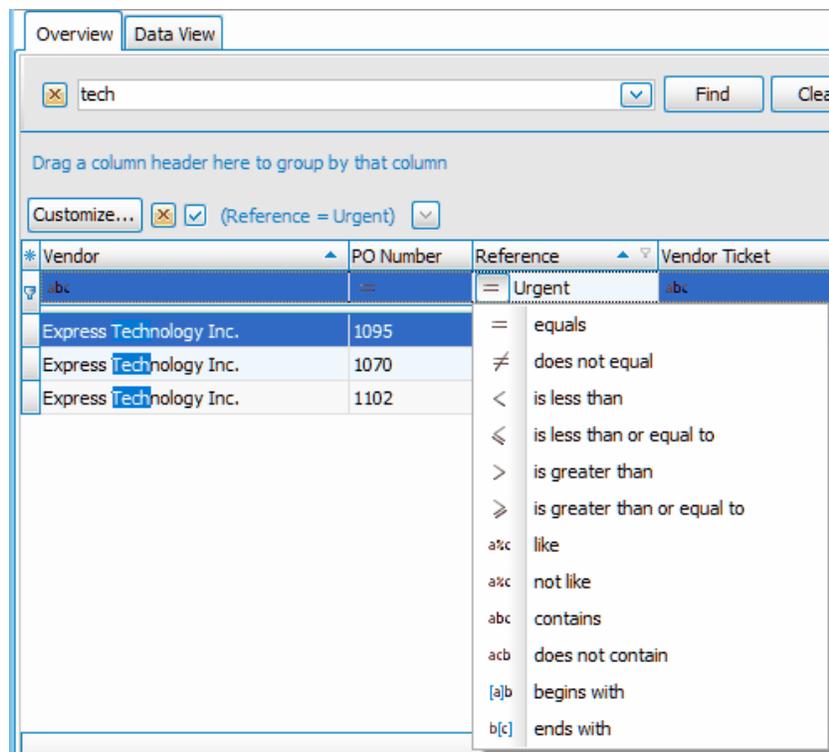

Image #5 - Filtering Feature

To use Filtering, click on the Filter button in the Data Navigator Bar (see Image #1, page 1). When Filtering is activated, an additional row appears right below the cell headers allowing you to enter filter data in one or more columns. In Image #5 above, you can see that 'Urgent' has been entered in the filter row above the Reference column. As a result, the only records appearing in the grid are the three records that meet the filter criteria of having 'Urgent' in the Reference column.

Notice in Image #5 there are many flexible options for filtering data. This along with the other Search and Find features provides great flexibility for quickly locating the record(s) you need to view / edit. You can simultaneously filter by multiple columns to find the exact records that meet your searching criteria.

6. Column Arranging - Click on the small button in the top left corner of any grid and a window will appear listing the available columns for that grid. You can then arrange the columns as desired as well as turn them on and off by checking or unchecking beside the column name.

You can also arrange columns by using the mouse and dragging the headers around on the grid. To remove a column from display, click on the header and drag it off the grid all together. To restore a column back in the grid, click the button in the top left corner and then check beside the desired column to have it appear.

Columns can also be sized by using the mouse and clicking on the right or left side of the column heading and expanding its width.

7. Footers - Notice in Image #2 on page 2, there is a footer at the bottom of the grid. You can apply a footer to any grid by right clicking on any column header and selecting the Footer option. This will turn on the grid footer. Then right click in the footer below the desired column and select the type of information you want displayed in the footer. There are several options depending on the type of data in the column. For example, you can choose from Count, Sum, Minimum, Maximum and Average.

Additional Information

However you customize your grid, ExpressMaintenance will remember your custom grid settings for the next time you open the data screen.

Each grid includes two popup menus. One is accessible by right clicking on any column heading. The other is accessible by right-clicking on any data row. Below is an example of the grid's popup menu.   There are several quick click options including the option to Export Grid Data. This means you can use the Find and Filter features to zoom in on the records you need and then export the data.
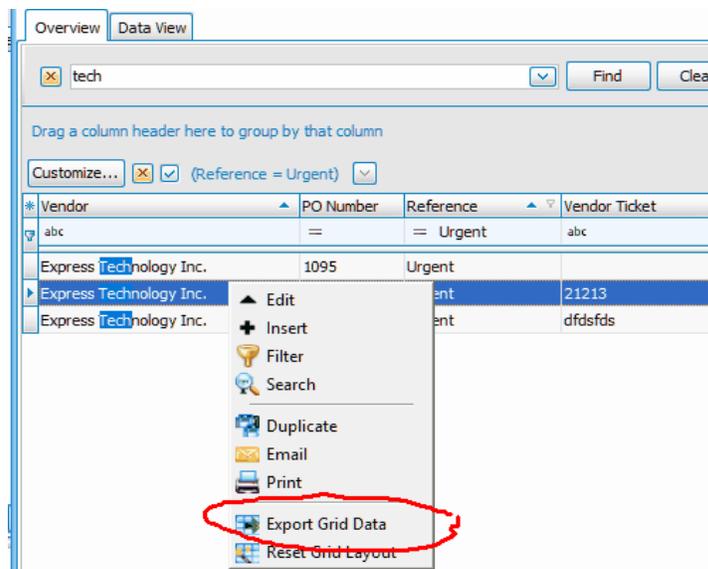

Image #6 - Grid Popup Menu

We recognize version 9 includes some significant differences from version 8. However, we are confident that with a little practice, you will soon value the flexible features and find them extremely valuable.