

siterra | Knowledge Base Article

General Navigation - Creating a Custom Grid View

Question:

How do I customize grid information in Siterra?

Answer:

Some grids in Siterra allow the creation of a custom grid view. The options available for custom views columns and filters differ from one grid to the next depending on the attributes that are available for that module. However, the method for creating the custom view remains the same across the Siterra Platform.

To begin, navigate to the grid results that need to be modified. The custom grid view will be available on all the same grids, so it is not specific to one instantiated object. This example depicts the Payment Lines grid.

First we will locate the “View” (1) dropdown at the top of the grid. From the dropdown list, we will select “—NEW--” (2).

Additional Information

Payment Lines											
Line No.	Accounting Period	Type	Planned Amount	Planned Amount Currency	Planned Date	Status	Status Date	Check No	Check Date	View	Reference No
1	2013/1	Common Area Maintenance	700.00	USD	01/01/2013	To be Paid	09/12/2013			Default New View Support View -- NEW --	

A small pop-up screen will be generated. The only required field is the “Name” field (3). It is auto-populated but it is suggested you provide a more specific name. Clicking “Default” (4) will make the new view be displayed automatically any time the grid is accessed. “Usage Level” (5) has two options; “Personal” - this view will only be available for your user account, and “Portfolio” - all users of the portfolio can use this view. The last option, “# of Rows in Page” (6), allows you to determine the number of rows displayed on your new grid view. After the information is complete, click “Save” (7) at the top of the screen.

The 'View Details' dialog box contains the following elements with numbered callouts:

- 7**: Save button (floppy disk icon)
- 3**: Name field (text input with 'New View' entered)
- 4**: Description field (text input with 'Example' entered)
- 5**: Usage Level dropdown menu (currently set to 'Personal')
- 6**: # of Rows in Page dropdown menu (currently set to '20')

After saving, a new portion appears to allow further customization. Values in the “Available Columns” (8) are values that are available for display, but are not currently in the grid view. Conversely, the values in the “Selected Columns” section (9) are selected and will be displayed as columns.

The 'View Details' dialog box shows the 'Columns' section expanded. It includes:

- 8**: Available Columns list (includes Actual Amount, Actual Amount Currency, Actual Date, Export State, Lease Name, Line Count, Line Link, Remarks, Row Style, Total Offset Currency).
- 9**: Selected Columns list (includes Line No., Accounting Period, Type, Planned Amount, Planned Amount Currency, Planned Date, Status, Status Date, Check No., Check Date, Check Amount, Reference No., Payees, Total Offset).
- Navigation buttons (single and double arrows) between the two lists.
- Up and down arrow buttons on the right side of the Selected Columns list.
- Column Properties** section at the bottom with a warning: "Please select exactly 1 column from either list above to edit its properties."

To move values between columns, highlight the desired value name, and use the single arrow keys (10) between the two sections to move them. It is also possible to move all values from table to the other by using either of the double arrow buttons (11). The up and down arrows (12) on the far right hand side of the window will allow you to modify where the values appear on your new view. Values top to bottom on the “Selected Columns” list will display from left to right on your new grid view.

The screenshot shows the 'View Details' window with the following sections:

- Buttons:** Save, Save & Close, Delete, Cancel.
- Name:** New View
- Description:** Example
- Default:** ☐
- Usage Level:** Personal
- # of Rows in Page:** 20
- Columns Section:**
 - Available Columns:** Actual Amount, Actual Amount Currency, Actual Date, Export State, Lease Name, Line Count, Line Link, Remarks, Row Style, Total Offset Currency.
 - Selected Columns:** Line No., Accounting Period, Type, Planned Amount, Planned Amount Currency, Planned Date, Status, Status Date, Check No., Check Date, Check Amount, Reference No., Payees, Total Offset.
- Column Properties:** Please select exactly 1 column from either list above to edit its properties.

When a value in the “Selected Columns” list is selected (13), the “Column Properties” (14) will display additional information and enable filtering on the value. These options allow you to customize the look of your new columns, as well as how they are ordered and displayed. You will also see a section named “Filter” inside this section.

The screenshot shows the 'Columns' window with the following sections:

- Available Columns:** Actual Amount, Actual Amount Currency, Actual Date, Export State, Lease Name, Line Count, Line Link, Remarks, Row Style, Total Offset Currency.
- Selected Columns:** Accounting Period, Type, Planned Amount, Planned Amount Currency, Planned Date, Status, Status Date, Check No., Check Date, Check Amount, Reference No., Payees, Total Offset, Net Planned Amount.
- Column Properties:**
 - Width:** 15
 - Alignment:** Left
 - Format:** [Dropdown]
 - Searchable?** ☒
 - Sort Direction:** None
 - Sort Order:** [Dropdown]
 - Filter:** Add

By clicking “Add” (15) in the Filter section, a new set of options will populate. These options are dependent on the data type stored in the column you are editing. You will see the attribute’s name, followed by a dropdown menu. This filter dropdown (16) will provide options to filter by. The last object is an empty box to type the requirements for the filter (17).

Column Properties

Width: Alignment: Format:

Searchable? ☒ Sort Direction: Sort Order:

Filter

+ Add

Status

Common to all value types are equal to (=), greater than (>), less than (<), and not equal to (!=). Other options will vary, for example, a text field may have the option of “Like” or “Not like”. The “Like” option will return only information that matches the text you enter into the box to the right.

Once all information has been entered, click “Save and Close” at the top of the screen.

View Details

 Save

 Save & Close

 Delete

 Cancel

* Name:

New View

Description:

Example

Default:

☐

Usage Level:

Personal

of Rows in Page:

20

Columns

Available Columns

Selected Columns

The newly created view will now be available for use on payment lines by selecting the name from the View drop down box.

View New View

Default

New View

Support View

-- NEW --

Status	Status Date	Check No	Check Date	Check Amount	Payee
To be Paid	09/12/2013				
To be Paid	09/12/2013				
To be Paid	09/12/2013				

Note: It is important to note, that creating or editing a custom view does not edit or change any data stored in the system in any way. Since this is true, it is possible to modify any of these settings and experiment with what works best for you in regards to data returned.