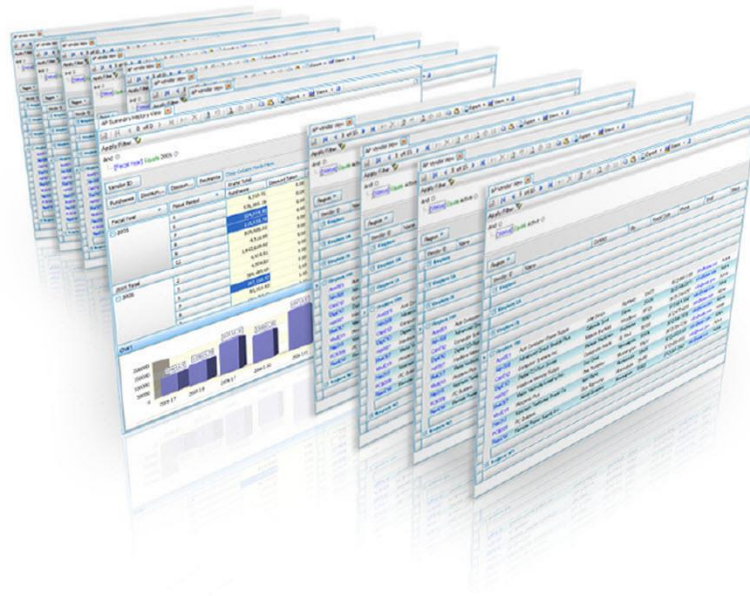




Interactive Views Tutorial

A Tutorial for Using Interactive Views

Knowledge Base Article



This document describes the intended features and technology for TRVERSE 11 as of November, 2016. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of TRVERSE.

November 2016

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Contents

Introduction	4
Parts of an Interactive View	5
Using the Data Filter	6
Filter Conditionals	6
Using And	7
Using OR.....	7
Grouping Data	8
Group Data by a Single Column	8
Group Data by Multiple Columns	9
Organizing Data in Ascending and Descending Order	9
Customizing Column Display.....	10
Filter Data by Selection	11
Show All Entries with a Blank Value.....	11
Show All Entries that are Not Blank.....	11
Show All Entries with a Selected Value.....	12
Create a Custom Selection Filter.....	12
Named Views	14
Save Named View	14
Edit Views.....	14
Delete Named Views.....	15
Open a Named View	15
Print or Export a Report	16
Print the Report Data.....	16
Export the Report Data	16

Introduction

TRVERSE Interactive Views display information in an interactive format. These highly-configurable data screens allow you to sort, group, and output information according to your unique needs. An interactive view is like an inquiry screen you can customize to show the information you want to see.

Parts of an Interactive View

The **Apply Filter** button will allow you to apply your data filter.

Use the report **Preview** button to view the data as a printed report. The Preview also allows you to save the report as various file types.

The **Export Data** button will allow you to export your filter results to various formats, including Excel, HTML, Text, and XML.

Use the **Reset Layout** button to clear filters, grouping, and sorting.

You can save your view by clicking the **Views** button.

Use the **Data Filter**

Use the Grouping Area to choose columns with which to group your data.

The column headings can be dragged into the Grouping Area, or dragged to rearrange the order.

Customer ID	Customer Name	Postal Code	Phone
MINST136	Mini Stop		Open
GMSG1446	GMSG		Open
7ELEVE1837	7-Eleven	Kwen Kim	19001-1125
BEEWO140	Beer World	Frank Haas	19001-2451
FROCAIN174	Frosty Caps Inc		19001-1811
BIGTOBE155	Big Top Beverage	Marianne Sarsfield	19001-2403

You can also sort columns by clicking on the heading, or filter columns by clicking on the funnel icon and selecting a value.

Filter funnel

Sort indicator

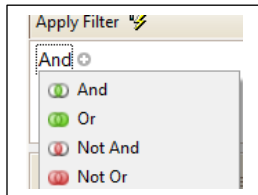
The filter funnel drop-down allows you to filter the view by selecting an existing value, blank values, non-blank values, or custom criteria for the chosen column.

City	Region
Philadelphia	(Custom)
Phoenixville	(Blanks)
Erie	(Non blanks)
Duncannon	Abbottstown
Philadelphia	Abington
	Adamstown
	Adamsville

Using the Data Filter

Use the Data Filter to reduce the amount of data that needs to be pulled to your workstation. This is important when there is a large amount of data available to reduce network traffic and speed up the retrieval of data.

Filter Conditionals



- **AND** -- **All** records must match **all** conditions you set. If you set conditions that contradict each other, such as “City begins with P AND City begins with R”, your view will have no results, because a city cannot begin with both P and R at the same time.

If you set conditions that can exist at the same time, you will get results from your filter. For example, this filter: “City begins with P AND City ends with E”, will include records for Phoenixville, Pine Grove, and Pipersville, but not Philadelphia, Paoli, or Adamsville.

- **OR** -- Records match **only one** condition you set. If you set conditions that contradict each other, such as “City begins with P OR City begins with R”, your view will have results that include only cities that begin with either P or R.

For example, this filter: “City begins with P OR City ends with E”, will include records for Phoenixville, Crum Lynne, Philadelphia, Paoli, and Adamsville, but not Bryn Mawr or Appleton.

- **NOT AND** -- **Eliminates all** records that meet **both** conditions. If you set conditions that contradict each other, such as “City begins with P NOT AND City begins with R”, your view will have the same results as only setting the condition of “City begins with P”, because a city cannot begin with both P and R at the same time anyway.

For example, this filter: “City begins with P NOT AND City ends with E”, will include records for Philadelphia, Appleton, Osceola, and New Prague, but not Phoenixville, Pine Grove, or Pipersville.

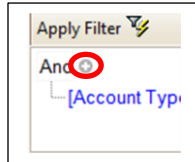
- **NOT OR** -- Records **do not** match **any** conditions you set. This is an elimination conditional.

For example, this filter: “City begins with P NOT OR City ends with E”, will include records for Appleton, Osceola, and Bryn Mawr, but not Phoenixville, New Prague, Philadelphia, or Bernville.

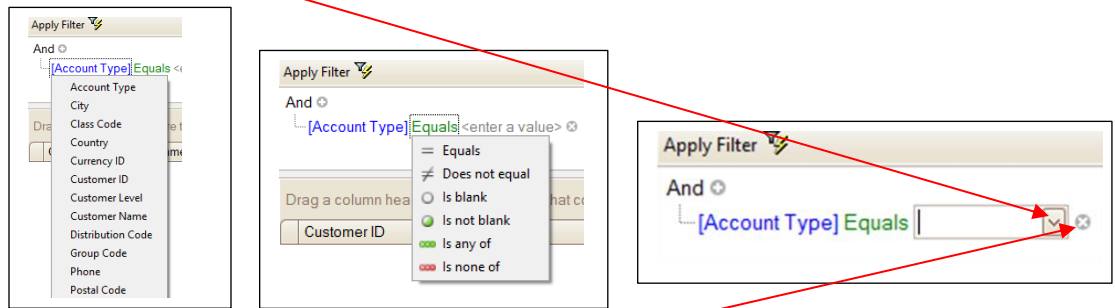
Using And


The **AND** conditional is used to filter your data to meet more than one condition.

1. Click on the **plus icon** to add an additional filter.



2. Click on the **blue, green and gray** text to show drop down menus for customizing your filter.
 - a. Select a criterion from the **blue** text menu.
 - b. Select a criterion from the **green** text menu.
 - c. Enter an **alphanumerical value** in the **gray** text box. Some **Views** will include a **drop down menu arrow** in the text box where you can select predetermined criteria.

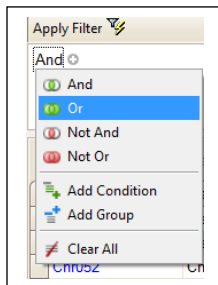


3. Click **Apply Filter** to display your data.
4. To remove a condition, click on the **x icon** to the far right.
5. If you want to **remove all** of the filter conditions, click the **reset layout button** , located to the right of the **Views** button, then click **Apply Filter** to refresh.

Using OR

The **OR** conditional is used to filter your data to meet one condition, but you may want to see multiple conditions.

1. To change from **AND** to **OR**, click **AND**, then a drop down menu will appear where you can select **OR**.



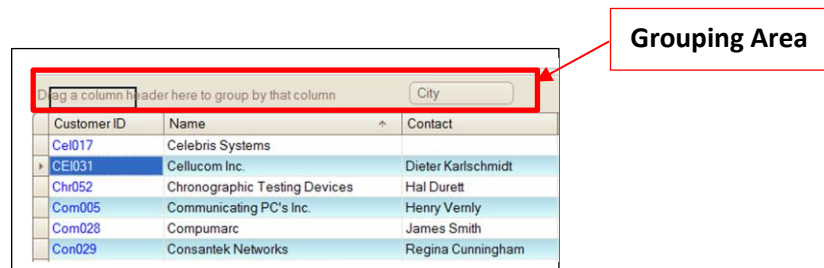
2. Select the desired criteria from the **blue, green and gray** drop down menus as you did for **AND**.
3. Click **Apply Filter**

Grouping Data

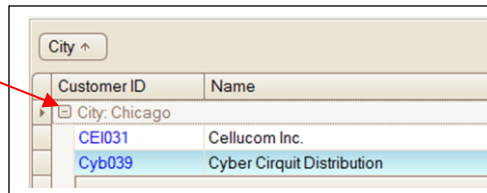
Group the data by column to change how the information is organized.

Group Data by a Single Column

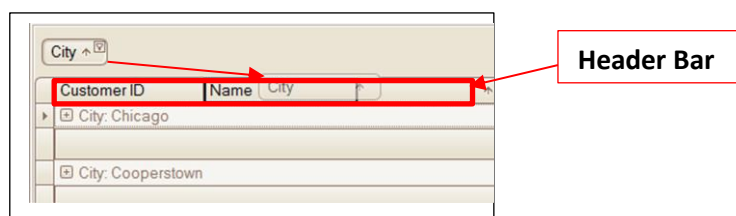
1. Click and drag the desired **Column Header** into the “grouping area.” A **black outlined box** will appear, then release the **Column Header** to place it in the **grouping area**



2. Once your **Column Header** is in place, you can click the **plus icon** (which will turn into a **minus icon**) to expand details of the **grouped column**.



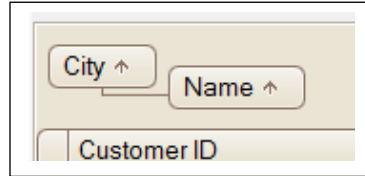
3. To **ungroup** the **Column Header**, click and drag the **Column Header** back into the desired location in the **Header Bar**. A **black outlined box** will appear where the **Column Header** is going to appear in the **Header Bar**. Release it when the **black outlined box** is in the desired location.



Alternatively, you can **right click** on a **Column Header** to select **Group by This Column** and **Ungroup**, instead of dragging and dropping the headers.

Group Data by Multiple Columns

To group data by multiple columns, simply drag and drop another **Column Header** to the **grouping area**, the same way you did for grouping by a single column.



Organizing Data in Ascending and Descending Order

Click the **arrow icon** on the grouped column button to change the organization of the data from **ascending** to **descending order**.

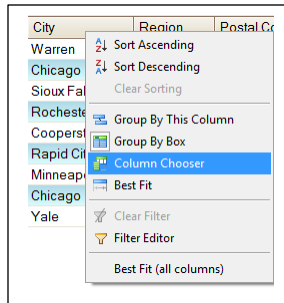


Customizing Column Display

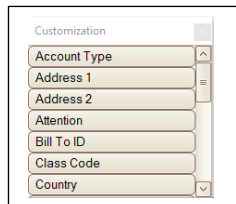
The columns displayed on the screen are not always all the columns available for an interactive view. You can add or subtract columns on the view to get the data you want.

To Add a column:

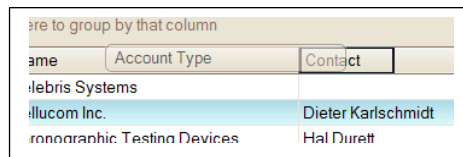
1. **Right-click on a Column Header, select Column Chooser**



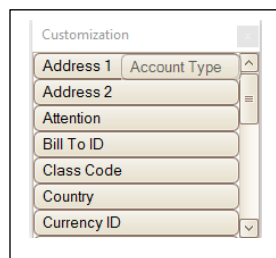
2. **A Customization Window will appear.**



3. **Drag and drop** a new column from the **Customization Window** into the **grid** next to the other column headers.



To remove a **Column**, drag and drop a column header into the **Customization Window**.



Filter Data by Selection

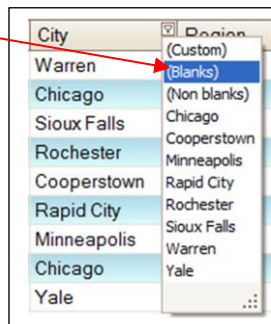
You might want to view only data for particular entries in the table, such as any record with a blank contact, or all records in Paoli, PA. You can do this by selecting the value to filter by from the column header.

Show All Entries with a Blank Value

1. Click on the **funnel icon**



2. Select **Blanks**

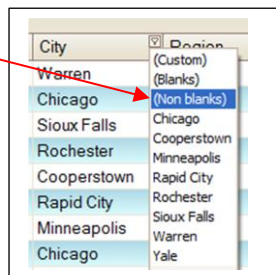


Show All Entries that are Not Blank

1. Click on the **funnel icon**.



2. Select **Non Blanks**

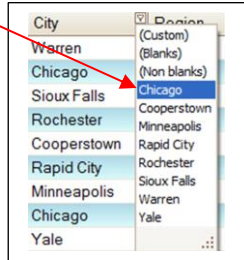


Show All Entries with a Selected Value

1. Click on the **funnel icon**.



2. Select a **data value**.

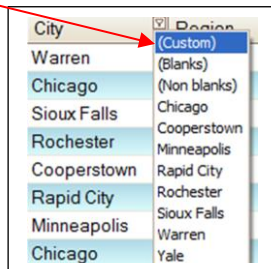


Create a Custom Selection Filter

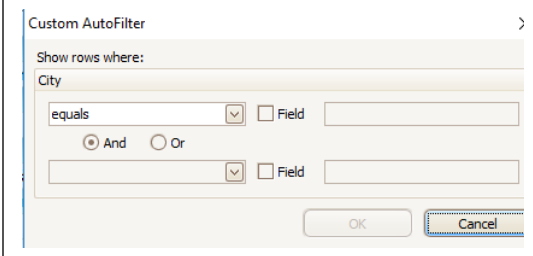
1. Click on the **funnel icon**.



2. Select **Custom**.



3. **Custom AutoFilter** appears.



Custom AutoFilter

Show rows where:

City

equals Field

And Or

Field

OK Cancel

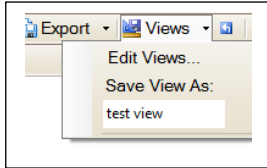
- OR** in this example will list all of the cities that match the first or the second conditions.
 - AND** in this example will list all of the cities that match both of the conditions.
 - Check the **Field** box if you want the column to match a different column in the table.
4. Click **OK** to apply the filter.

Named Views

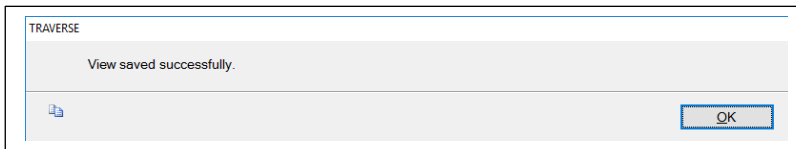
When you have an interactive view set up with the criteria you want, and would like to save that view for future use, you can create a named view.

Save Named View

1. Click on **Views** button on the **Toolbar**.
2. Under **Save View As**, enter a name.

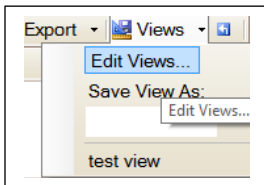


3. A notification will appear that says the view is saved, then click **OK**.

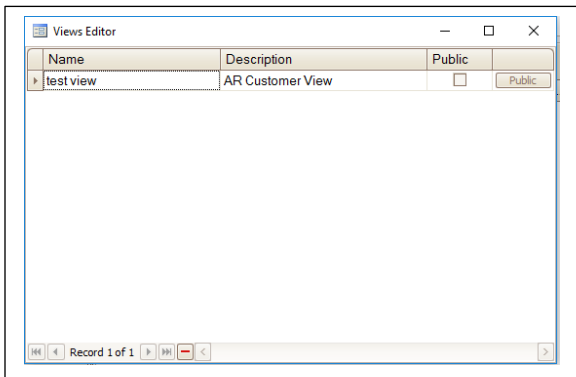


Edit Views

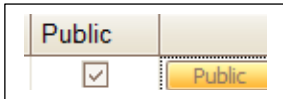
1. Click on the **Views** button.
2. Select **Edit Views**.



3. **Views Editor** appears.



4. Change from **public** to **private** by clearing the check box.



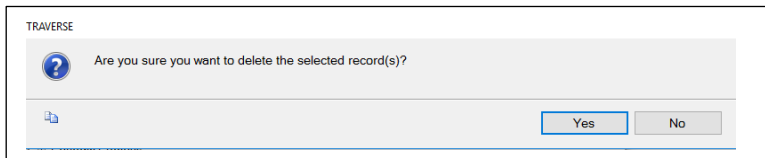
5. Make your changes to the interactive view.

Delete Named Views

1. To **delete Named Views**, select the **View** so there is an arrow in the left gray column, then click the **minus/delete record button**.



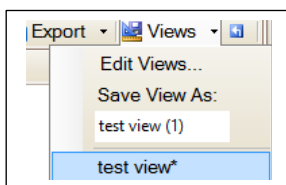
2. A **notification** will appear, select **Yes**.



3. Close editor with the x in the top right corner.


Open a Named View

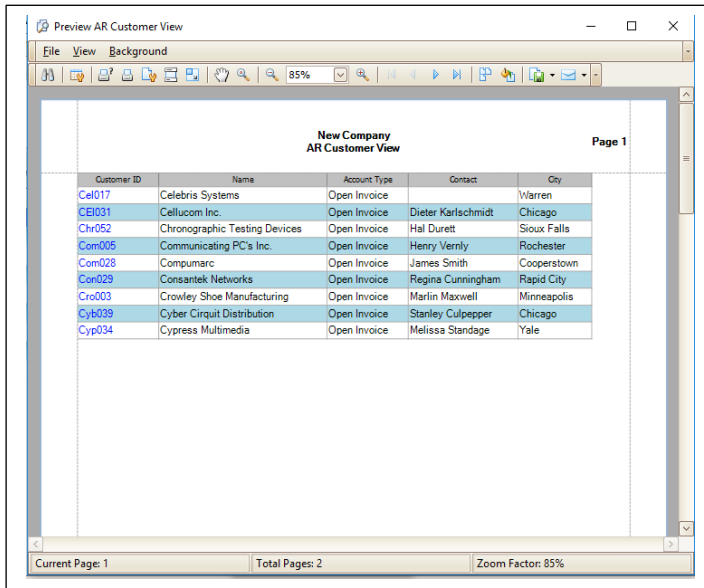
1. Click on the **Views button**
2. Select the **Named View**



Print or Export a Report

Print the Report Data

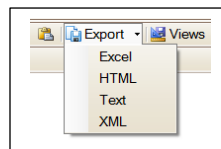
1. Set up your window how you want it to look as a printed document.
2. Click **Print Preview** button .



3. Use the print command buttons in the preview window to print or save the report data.
4. Close preview window with the x in the corner.

Export the Report Data

1. Click on the **Export** button on the **Toolbar**.



2. Choose the format for the export and click.