Appendix II: Time Saving Hints

II.A Viewing Multiple Records

II.B Sorting Records

II.C   Filtering Records

II.D Creating Favorites for Inventory Records

II.E Creating Favorites for Reports

Viewing Multiple Records

The following illustrates a quick method to edit multiple Records of the same kind, such as Site Records, without having to switch back and forth between the List View and the Detail View each time you want to edit another Record.

This method is particularly helpful when you need to:

- Address new reporting requirements for existing inventory, such as site block/lot information.

- Copy and Paste multiple Inventory Items and then edit them. *(Use of the Copy and Paste feature is recommended for addressing new reporting requirements such as grossing factor spaces, parking lots, playgrounds, and playfields.)*
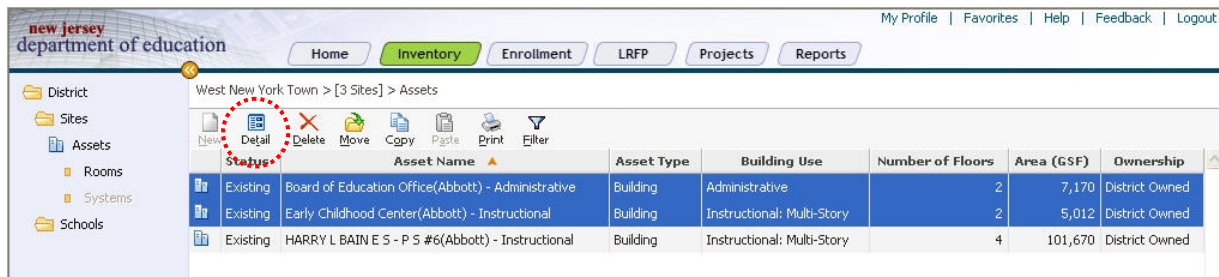
STEP 1 - In the List View, select the records that you would like to view or edit. Highlight the first record, and then hold down the `Shift` Key to select contiguous records or hold down the `Control` Key to select non-contiguous records.

STEP 2 - After you have selected the records that you want to view, "click" on the Detail Icon.

STEP 3 - After you "click" on the Detail Icon, you will see the Detail View of that first record that you selected. Review and edit the record as needed. When you are finished, "click" on the arrow in the Record Counter in the top right-hand corner of the screen. The Record Counter allows you to move forward or backward through the Detail View of each selected record.
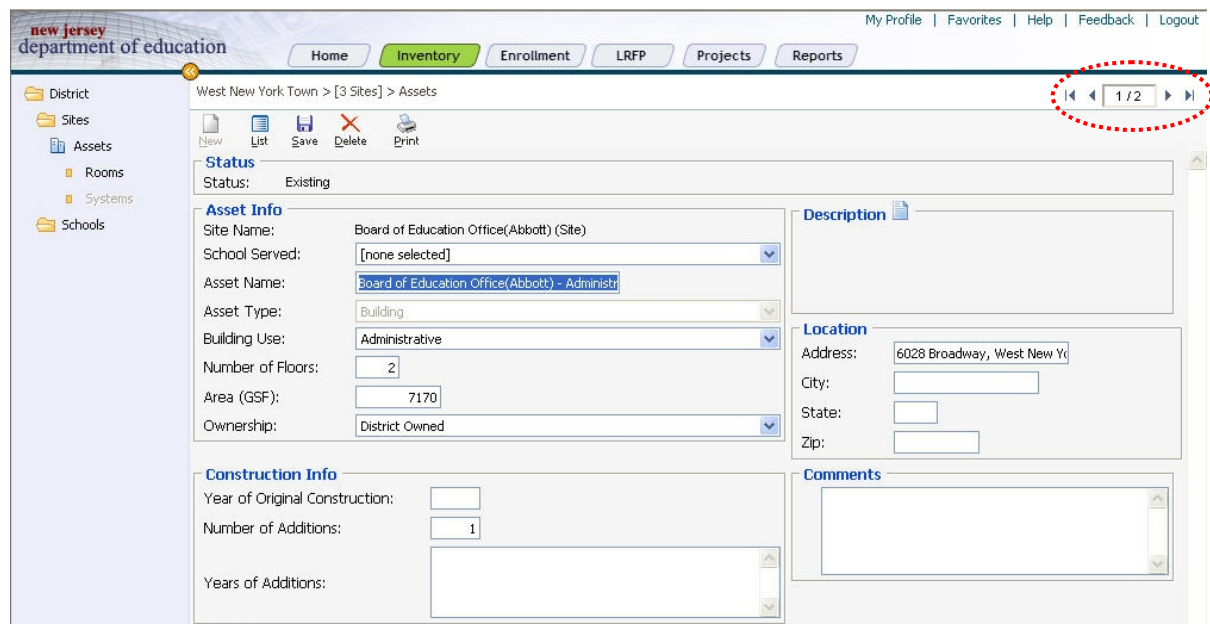
Note: An Asset List is shown, but you can select multiple records in any List View.

Assets – List View

Assets – Detail View

II.A

Sorting Records

The Sort feature can help you quickly find and select records in the List View. This feature is particularly helpful if you have a long list of records from which to choose, such as Room Records.

Ascending and Descending Sorts: In the List View, records can be sorted alphabetically and numerically, in ascending or descending order, by "clicking" on any of the column headers. Each List View defaults to sorting records by the first column in ascending order. The first time you "click" on a column header, the records will sort in ascending order. The second time you "click" on the same column header, the records will sort in descending order. When a list is sorted, a triangle appears next to the column heading indicating the direction *(ascending or descending)* that the column has been sorted.

Multiple Sorts: Once a Primary Sort has been selected, the records can be sorted by one or more of the remaining column headers. The records in the pictures to the right have been sorted first by Status in descending order, and then by Area in ascending order.

Note: A Room List is shown, but you can select sort records in any List View.

Room – List View / Primary Sort Ascending

Room – List View / Descending Order

Room – List View / Multiple Sorts

II.B

Filtering Records

If you have a long list of records, you can "filter" the records to only view those that you are interesting in reviewing.

Filters take sorting one more step. Sorting allows you to order the records by the column headers, whereas Filtering allows you not only to order the records but also exclude from view any records that do not match the criteria of the filter. This feature will be particularly useful when editing rooms.
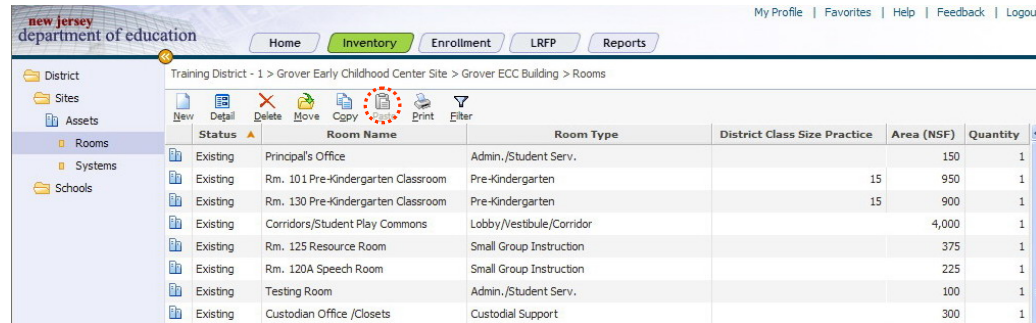
STEP 1 – While in the List View, "click" on the Filter Icon ⧩ Filter . The Select Filter Criteria Dialog Box appears.

STEP 2 – In the Select Filter Criteria Dialog Box, set the Field, Operator, and Value. You can filter by multiple fields. Choose "And" if you want the record to match all the selected criteria. Choose "Or" if the record only needs to match one of the selected criteria.

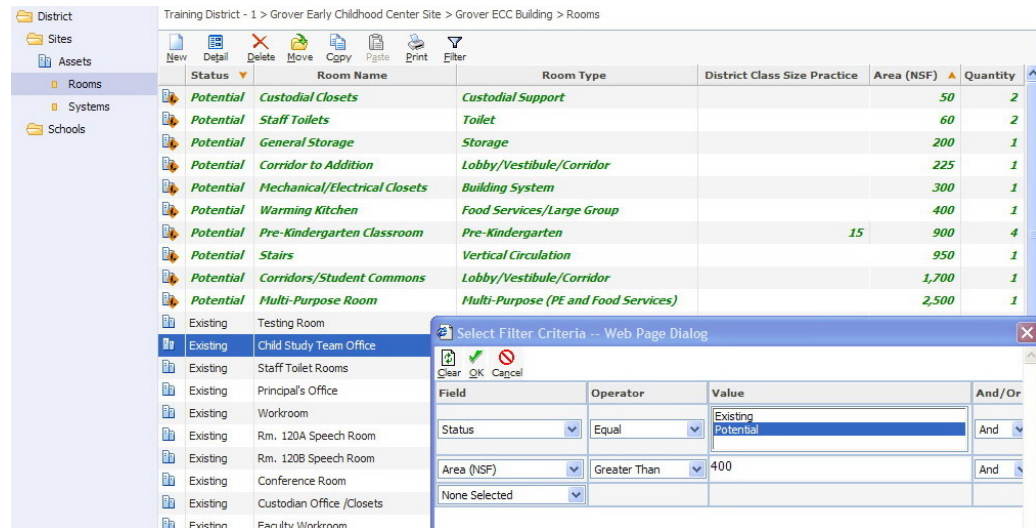**STEP 3 –** After you have selected the Fields you want to include, "click" on the OK Icon.

In the example to the right, we wanted to filter the Room List to only view Potential Rooms that are sized greater than 900 square feet. The criteria selection for the filtering were (1) a Status of Potential and (2) an Area greater than 900 square feet. *(Note: A Filter is not limited to only two criteria.)*

Note: A Room List is shown, but you can filter records in any List View.

Room – List View

Room – List View (Showing Filter Criteria Selection)

Room – List View (Results of Filter)

II.C

Creating Favorites for Inventory Records

A Favorite is a saved context. Favorites are especially helpful if you need to return to a context, or area of the website, on multiple occasions. For example, you can save a particular Inventory Record List View as a Favorite. Favorites can also be used to save Report Selection Criteria.

STEP 1 - In the example to the right, we are using the results of the Filter we ran on the previous page. Once the desired context has been determined, "click" on Favorite in the top right hand corner of the screen. "Click" on Add Favorite and a Save Favorite Dialog box will appear.

STEP 2 - Enter a Name and "click" on OK to save the Favorite.

STEP 3 - Once a Favorite is saved, it can be accessed form either the Home Page or from the Favorites pull-down menu, which can be accessed from anywhere on the website.

Room – List View (From Filter on Previous Page)

Save Favorite Dialog Box

Accessing a Saved Favorite
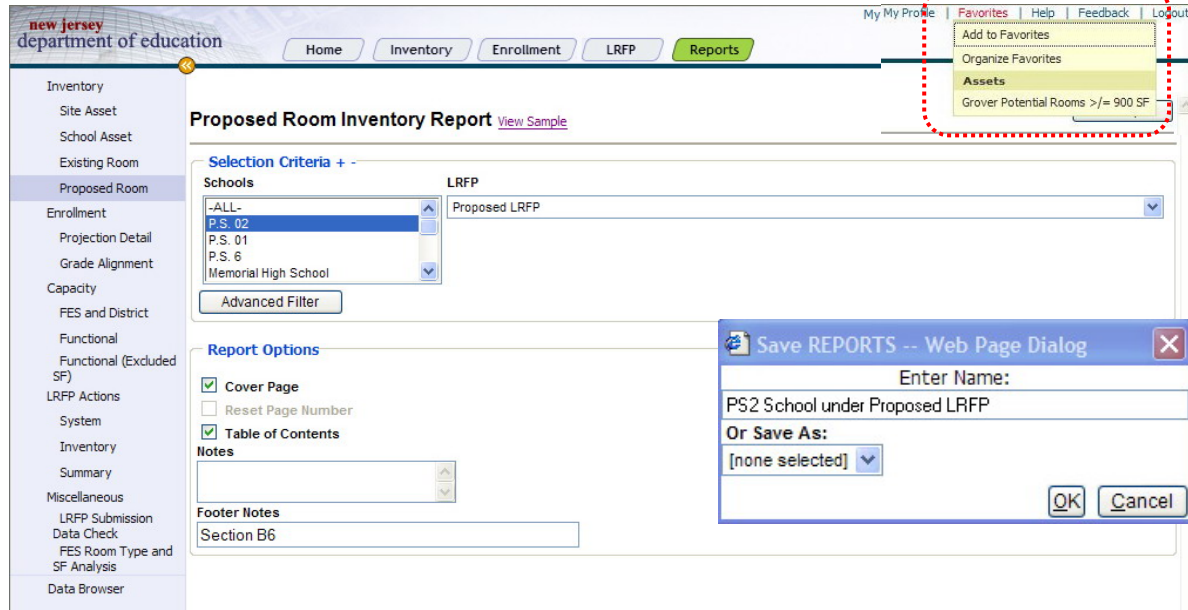
Creating Favorites for Reports

Report – Selection Screen

You can add a Report to your Favorites. Favorites are especially helpful if you need to return to a report on multiple occasions. In the example below, we are creating a Favorite for the Proposed Room Inventory Report for P.S. 2.

STEP 1 - After you have selected the desired Selection Criteria and Report Options, "click" on Favorite in the top right corner of the screen. "Click" on Add Favorite and a Save Favorite Dialog box will appear.

STEP 2 - Enter a Name and "click" on OK to save the Favorite.

STEP 3 - Once a Favorite is saved, it can be accessed form either the Home Page or from the Favorite pull down, which can be accessed from anywhere on the website at the top right-hand corner of the screen.

Accessing a Saved Favorite