Admin View and Filter Sets

Share Page Links and Favorites

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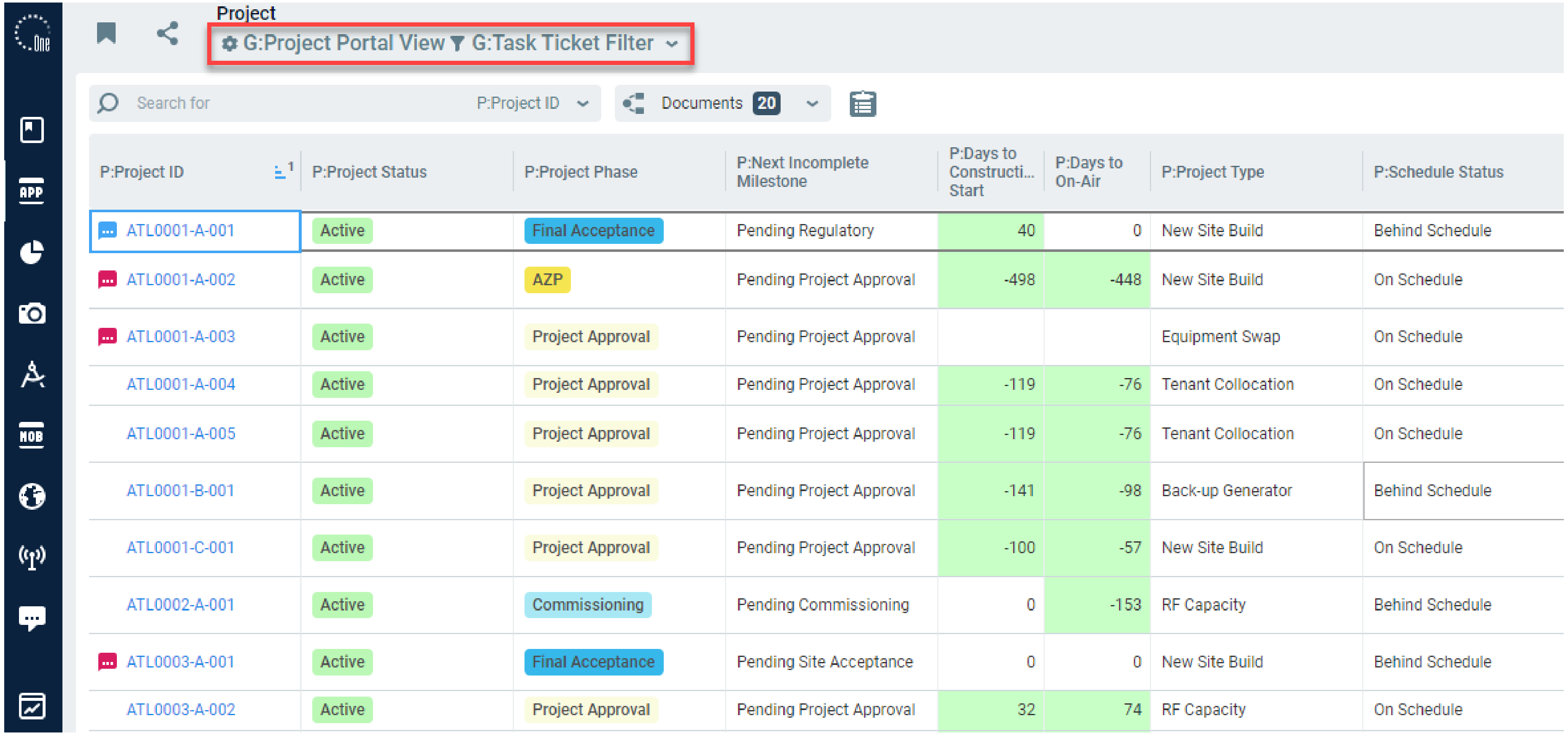
Trackor Browser Grid

The Trackor Browser Grid shows Fields for a Trackor Type based on the View and Filter Options



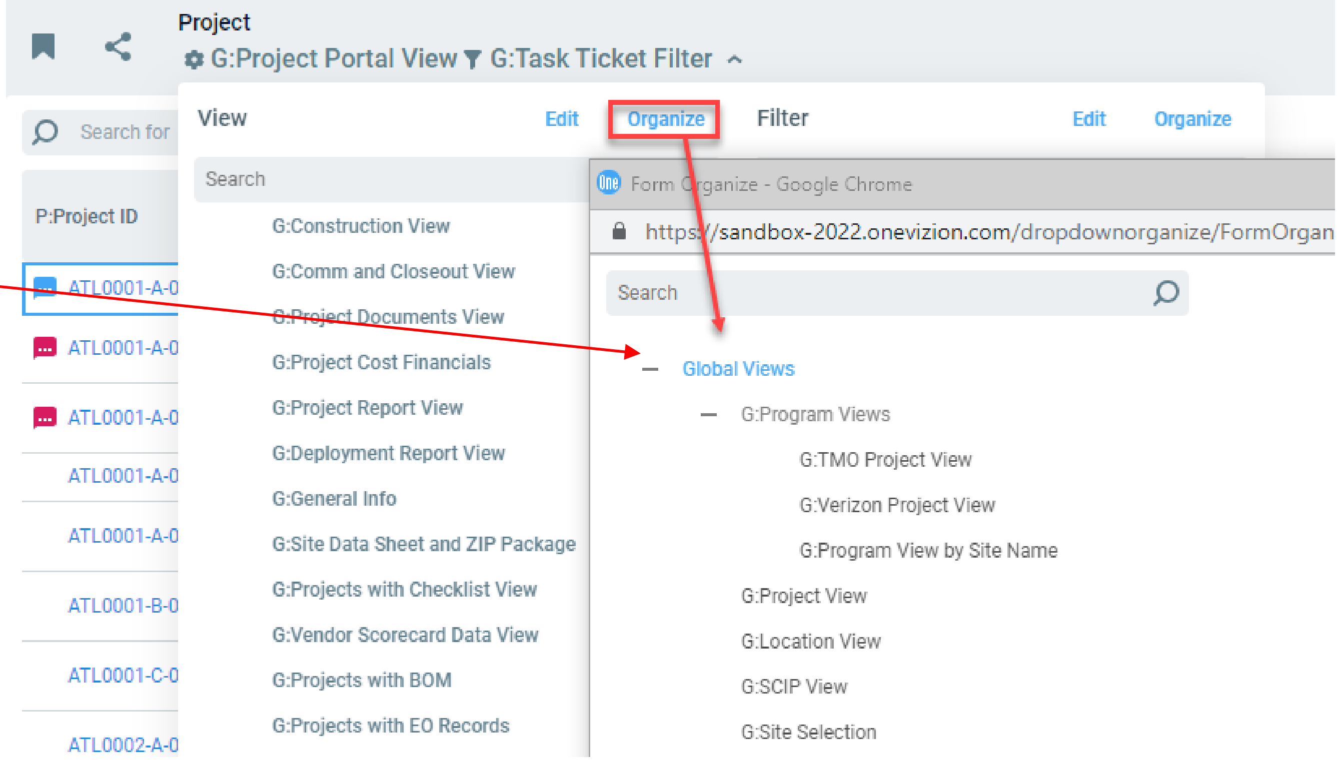
Views

Folders containing Views and Filters are created by using the Organize View Icon Organize

List of existing Views

Folders may be moved up or down the list by using the icons. Up Down

Local Views may be promoted to Global by using the icon. Promote to Global



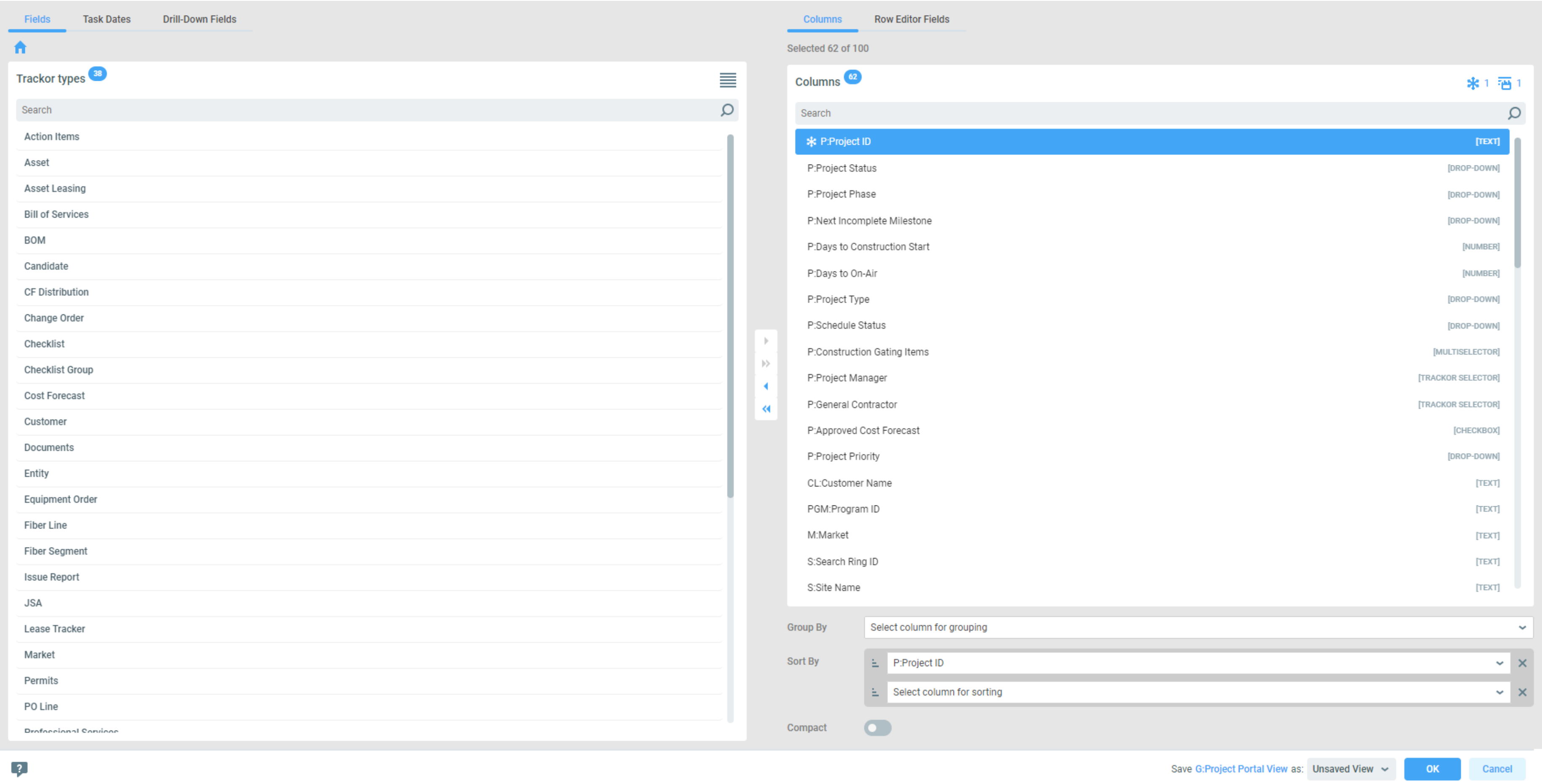
View Editor Form

Fields, Task Date and Drill Down fields can be added to the view columns on the right.

If tasks or drill down fields are not configured for this Trackor Type, the Task Date button disappears.

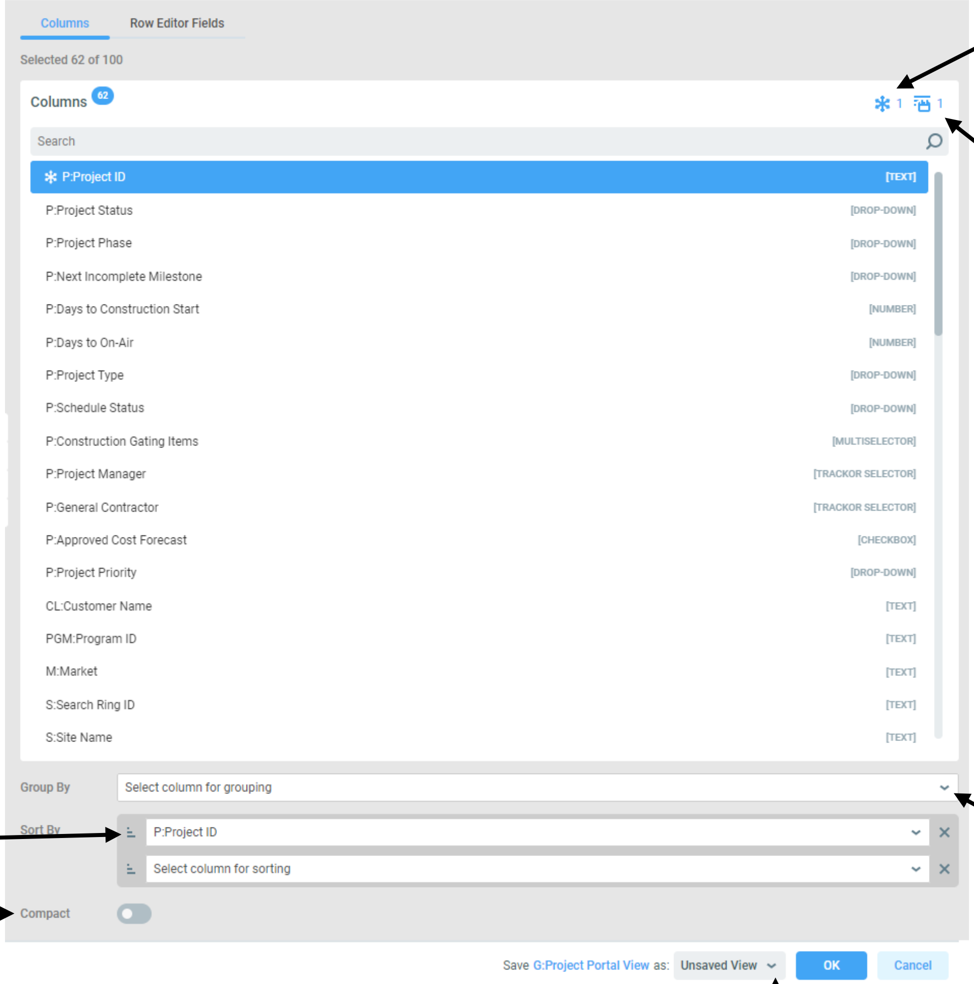
If Fields list grows to greater than 3000, then it will ask for the user to chose Trackor Type first.

Views can be created for each different Group/Department the administrator may choose to save these globally or locally.



Views Editor Form

For more detailed information on Views please refer to the online [Views]() documentation.



Number of frozen columns (1)

Highlight recently changed fields (1 Day)

Sort Ascending or Descending

Sort Columns

Compact View

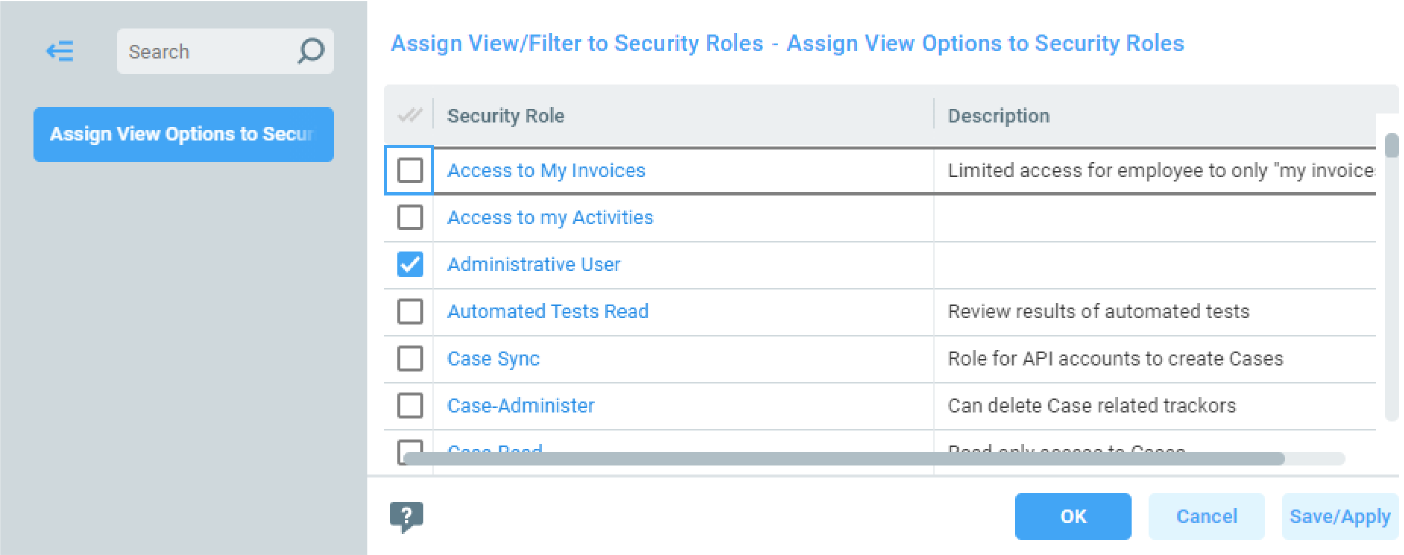
Saved Unsaved View as an existing View

Views - Security Roles

When a new global view is created, the system automatically assigns the security role based on the default assignments set up for each security role. Users who are assigned to the same security role will be able to access the global view.

However, the administrator can also assign additional security roles (in addition to the default role) to a global view directly from the application page.

To assign a security role to a view option from the application page click the Sec Roles Assignments Icon, Sec Roles to open the Edit Security Role applet.



Views – Compact Mode

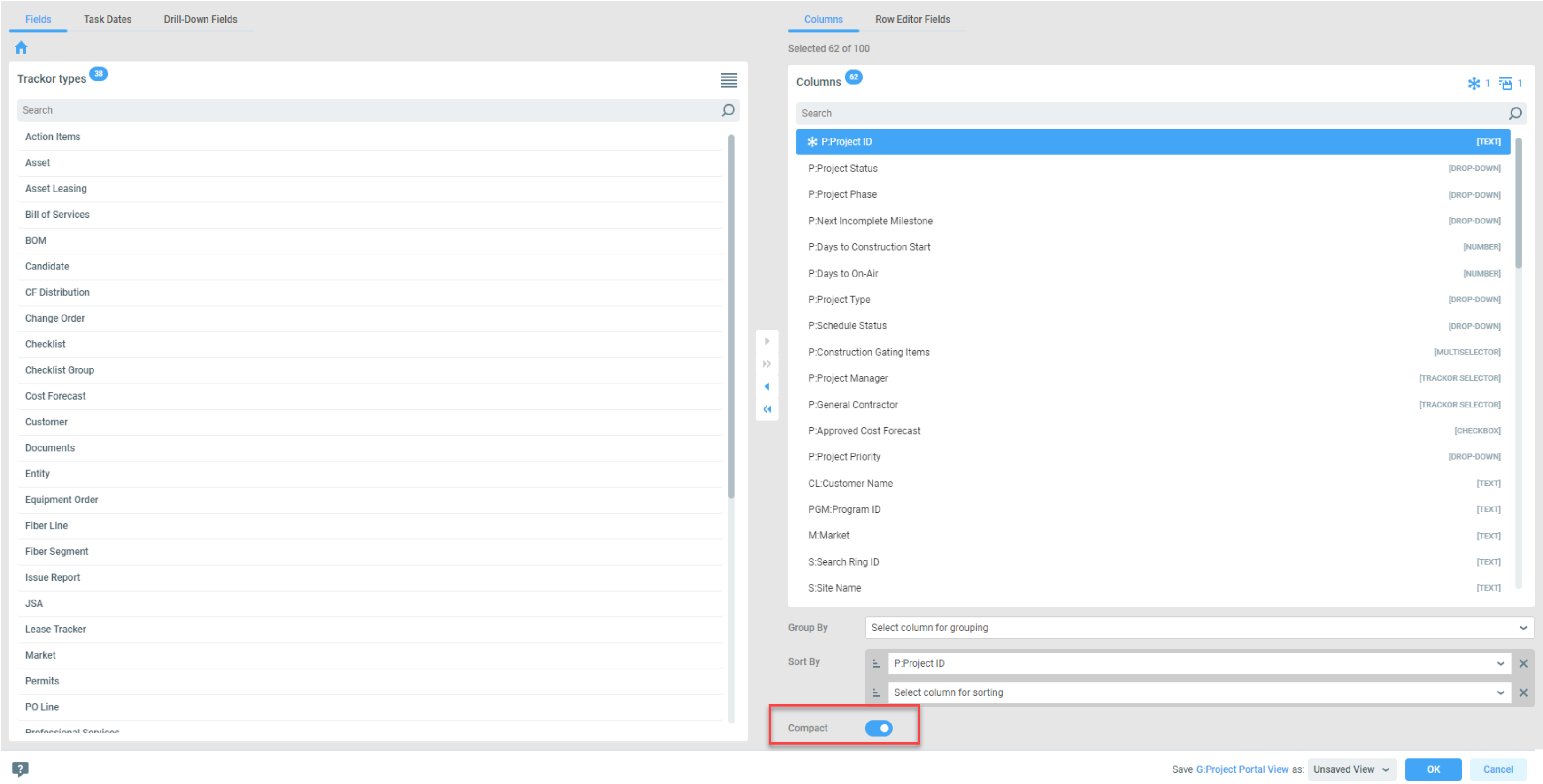
View Options switch "Compact" to enable compact mode for a specific View Option.

This option will be available on all user (trackor-specific) grids:
Trackor Browser, Tasks View, Tasks Overview, Summary, Workflow, Mapping, E-File Browser.

When the compact mode is turned on all rows in a grid will be displayed in a single line. Long field values will be trimmed with an ellipsis.

E-File fields will be displayed without any preview - only filetype icon and filename will be shown.

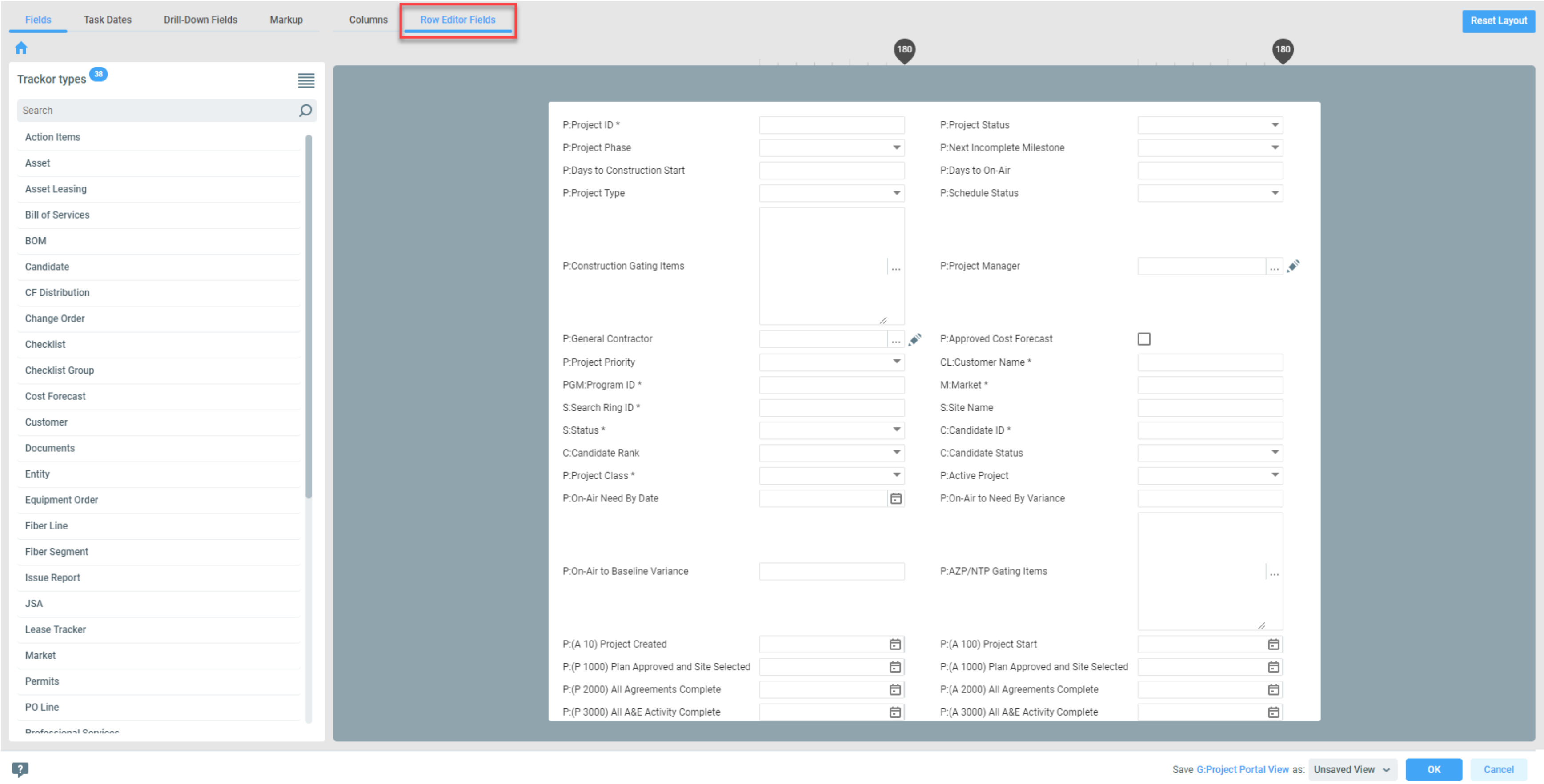
Wiki fields will display text only without additional formatting (original view will be available in edit mode)



Views – Row Editor Form (example)

Administrators may set up the Row Editor Form to enable users to update data while using the Row Editor. This is helpful when there are multiple Trackors to be updated.

From the View Options form select the Row Editor Fields tab. Drag and drop the fields that users will need on the Grid Row Editor Form.

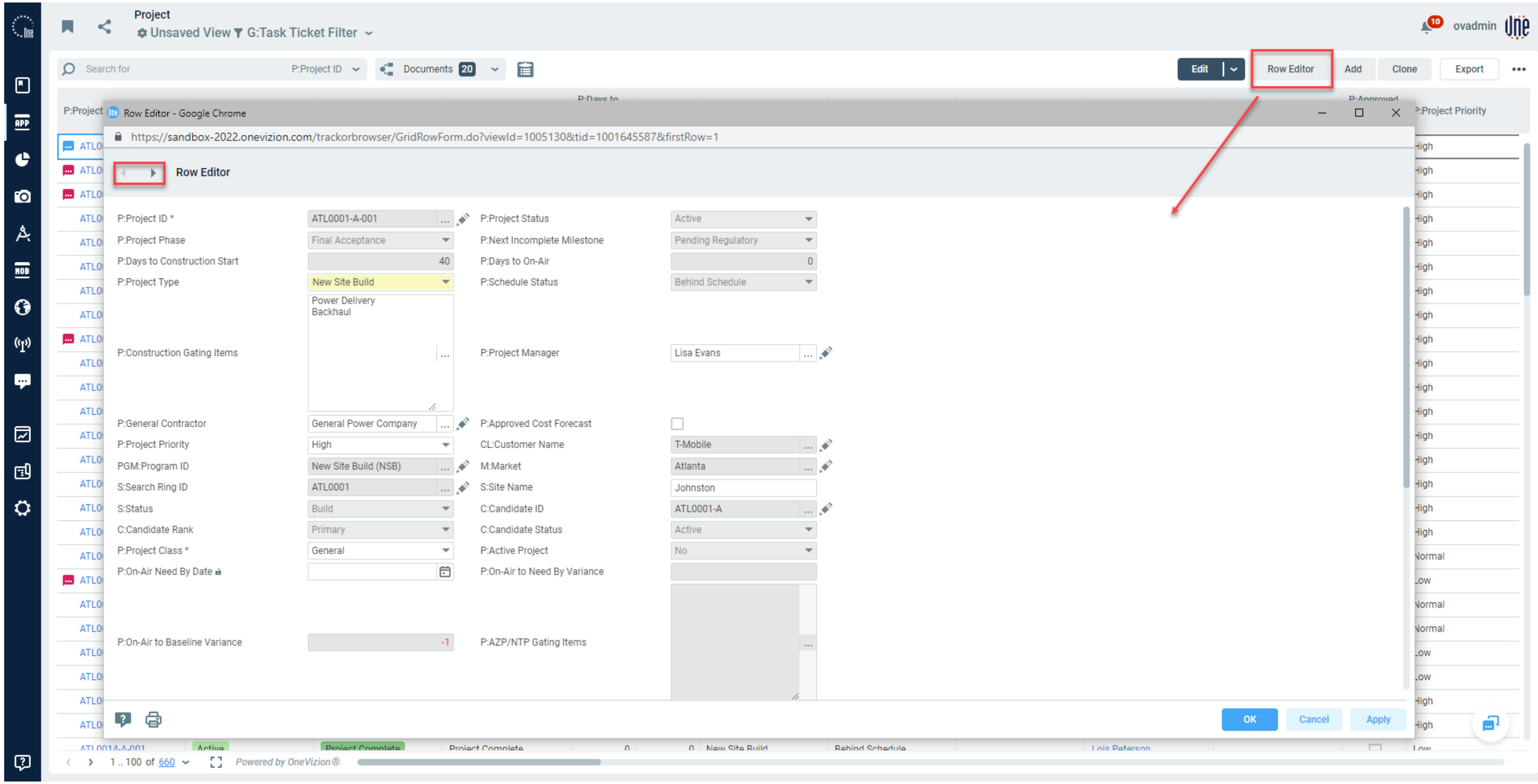


Views – Row Editor Form

Users can choose the Row Editor button.

This will open an applet containing all fields that are added to the Row Editor Form.

Users may navigate back and forth using the arrows in the top-let hand corner.



Filters

Filters are used to restrict the Trackors returned in the Trackor Browser Grid. Filters can be accessed by clicking the Filter Icon located on the Header.

Users may lookup fields in Filter Options. An example would be, typing 'status' and hitting enter in Filter fields, will bring up all fields (up to 100 fields) that contain 'status' in its name. If the search brings mores than 100 fields, none of them will be shown. Users can use this approach to save time and clicks. Users can still click on the ellipsis and lookup the specific field.

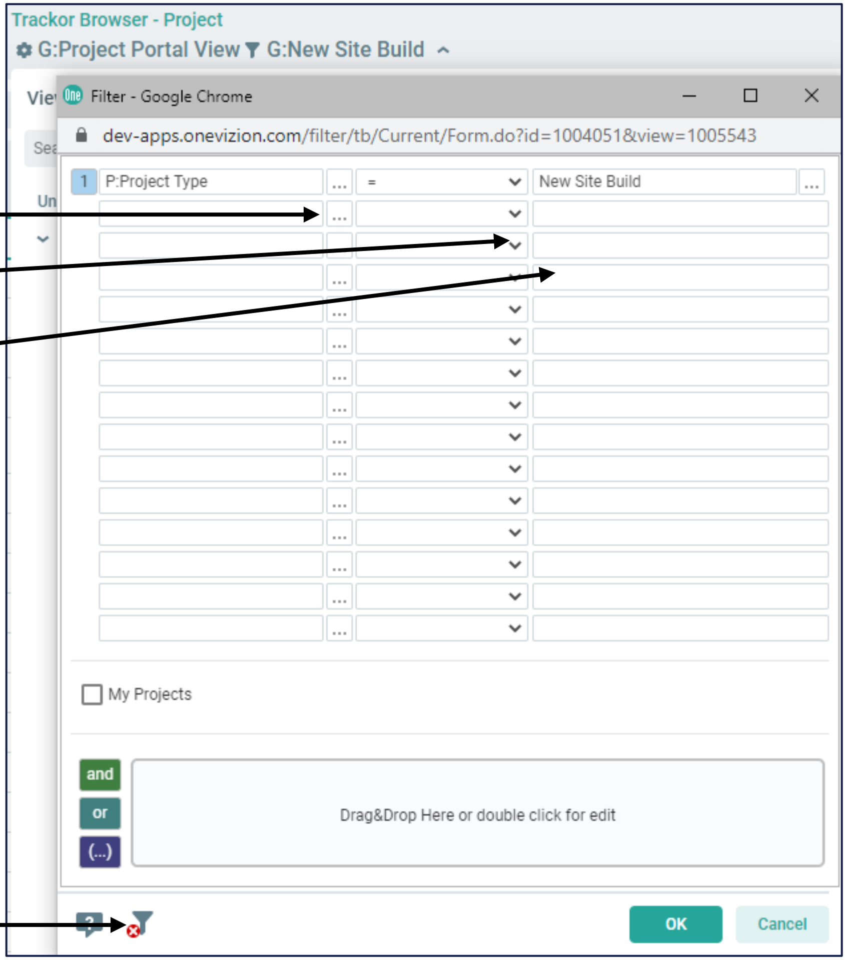
Choose a field to filter by

Choose an operator

Choose a value to filter by

If a field is listed twice, it is "or" logic.
All other fields are "and" logic.

Clear active Filter

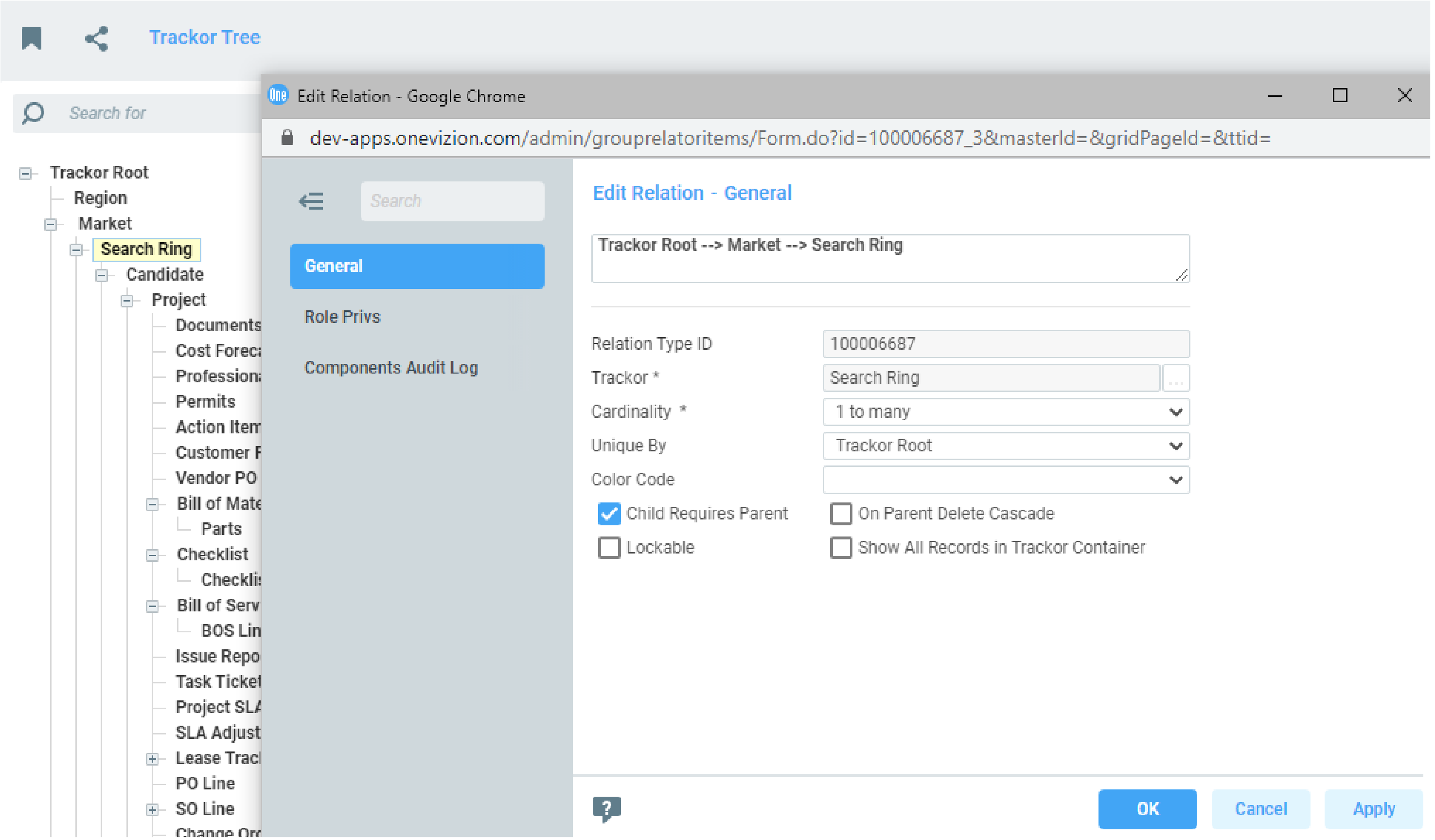


Relations

Relations allow for quickly accessing related Trackors at the level immediately above or below the given Trackor Type

1 to Many: Easy to add parent fields into view without affecting record count.
Parent "Site"
Adding child fields into view will affect record count since there will be a row per child.
Children "Doc1", "Doc2", etc.

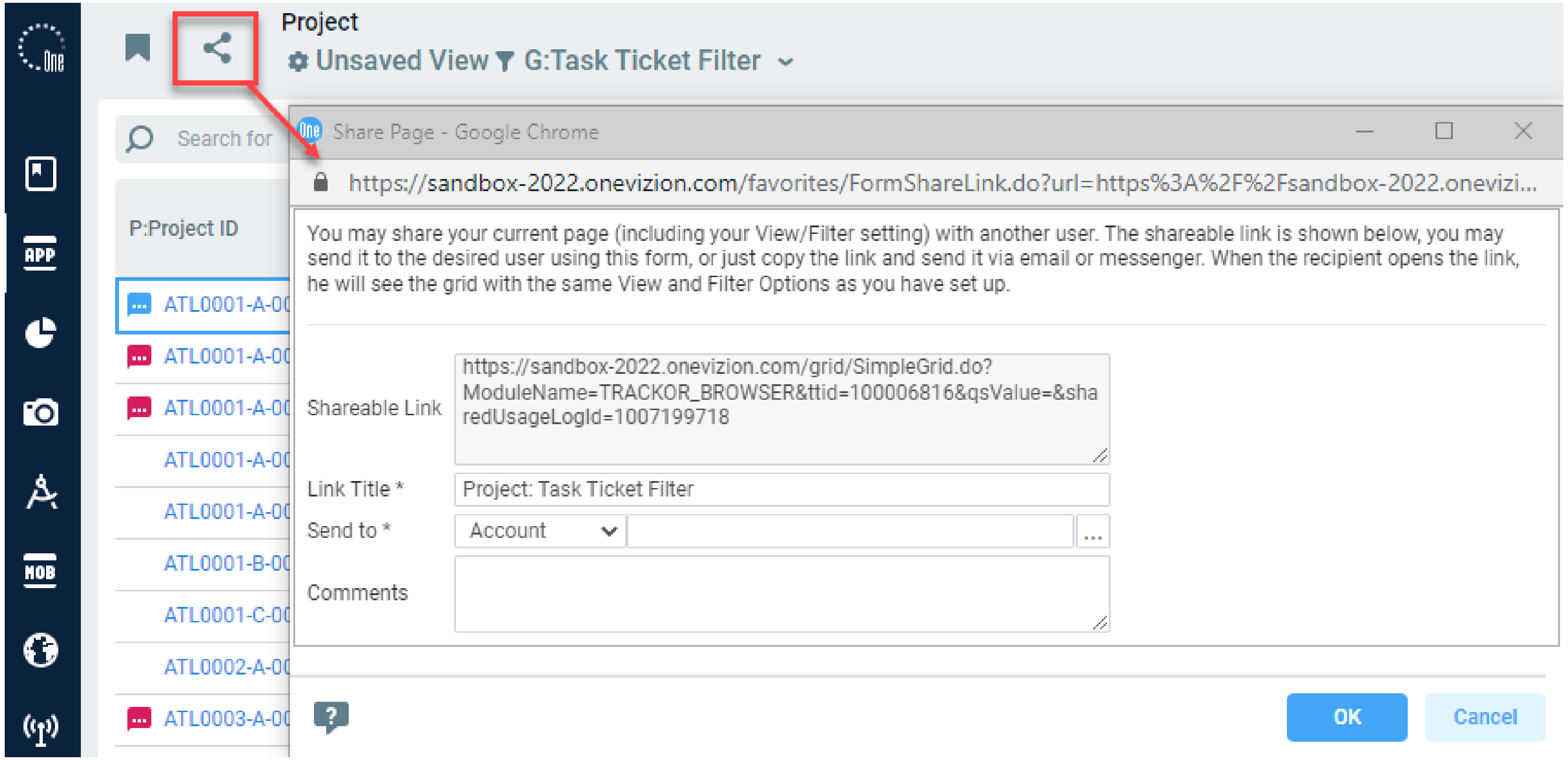
Many to Many: Adding parent or child fields into view will affect record count dramatically.



Many to many cardinality complicate any future relations in which this Trackor Type will be involved. Only select this if you have detailed knowledge of entity relationships in databases.

Share Page Links

The Share Page Link feature enables a user to share Application Pages with other OneVizion users.



Favorites

The Favorites feature enables a user to add their Favorite Application Pages to a group of folders. Users are also able to Organize their Favorites in Folders to suit their requirements.