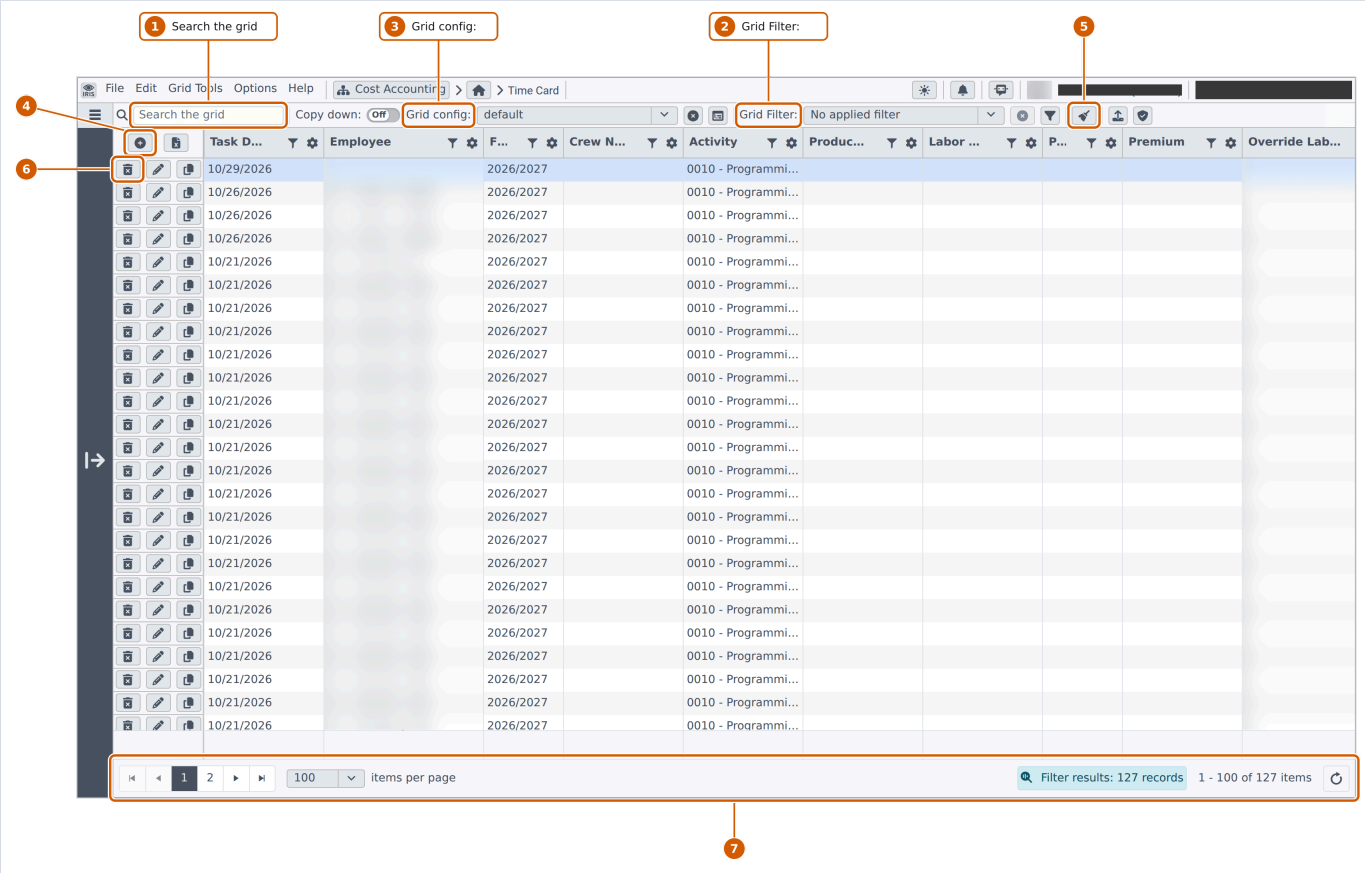
Data grid overview and basics

Overview

You see the same grid layout on most IRIS10 lists. This page uses Time Card as the example. On a grid, you see a toolbar above the rows, column headings, row buttons, and a pager at the bottom.



The Time Card grid shows the parts most IRIS10 grids share.

1. Search the grid
2. Grid Filter:
3. Grid config:
4. Add new record
5. Bulk delete mode
6. Row buttons: Delete, Edit, Duplicate, view cell
7. Pager and record count

In this topic, you learn to:

- Recognize the parts of an IRIS10 grid: toolbar, column headings, row buttons, and pager.
- Find records with **Search the grid**, sorting, and paging.
- Open a column's menu and see what it offers.

- Find where to start adding, editing, duplicating, and deleting records.

Before you begin

- You can sign in to IRIS10.
- You can open a page that contains a grid, for example Time Card at `/cas/timecard`. See Navigating portals and pages.

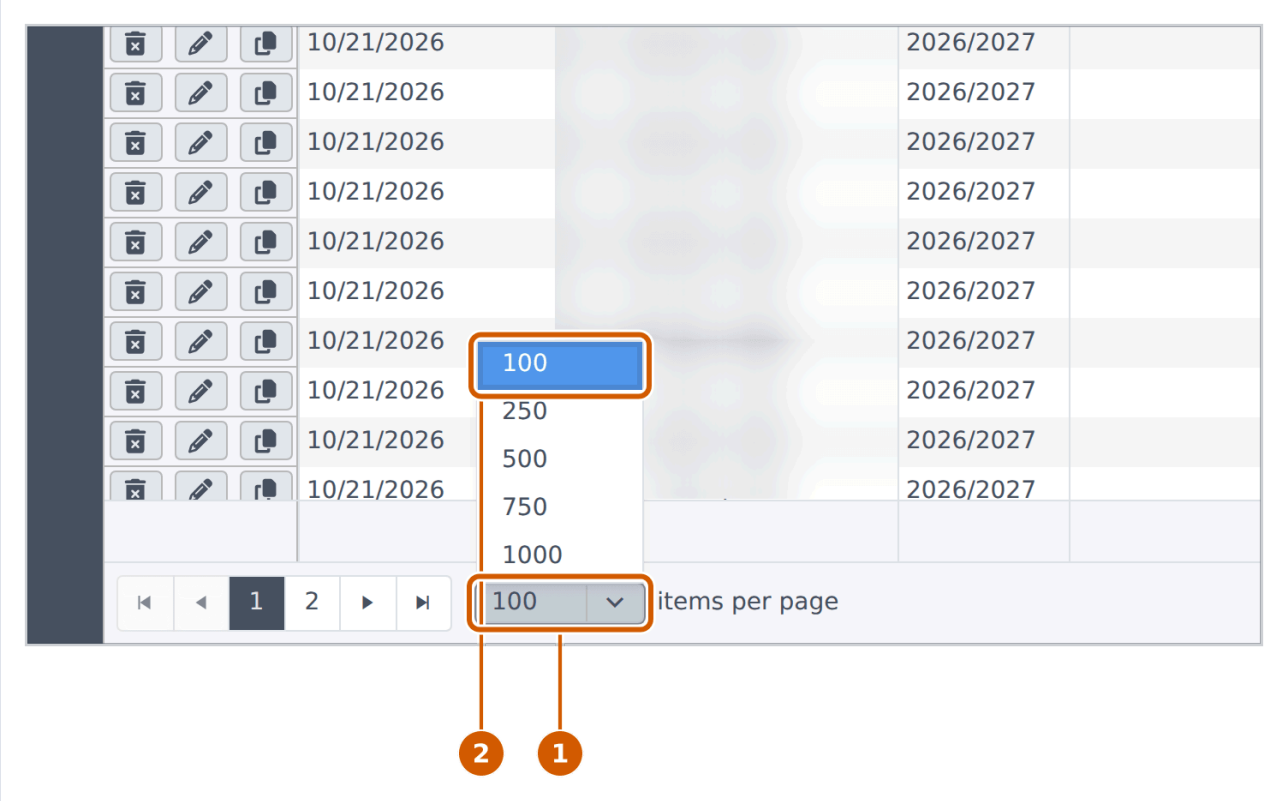
Procedure

Check how many records the grid holds and change the page size

1. Look at the pager at the bottom of the grid.

   The pager shows the page buttons, the items-per-page setting and the record count, for example `Filter results: 127 records` and `1 - 100 of 127 items`.
2. Click the **Page sizes** drop-down in the pager.

   The list offers 100, 250, 500, 750 and 1000.



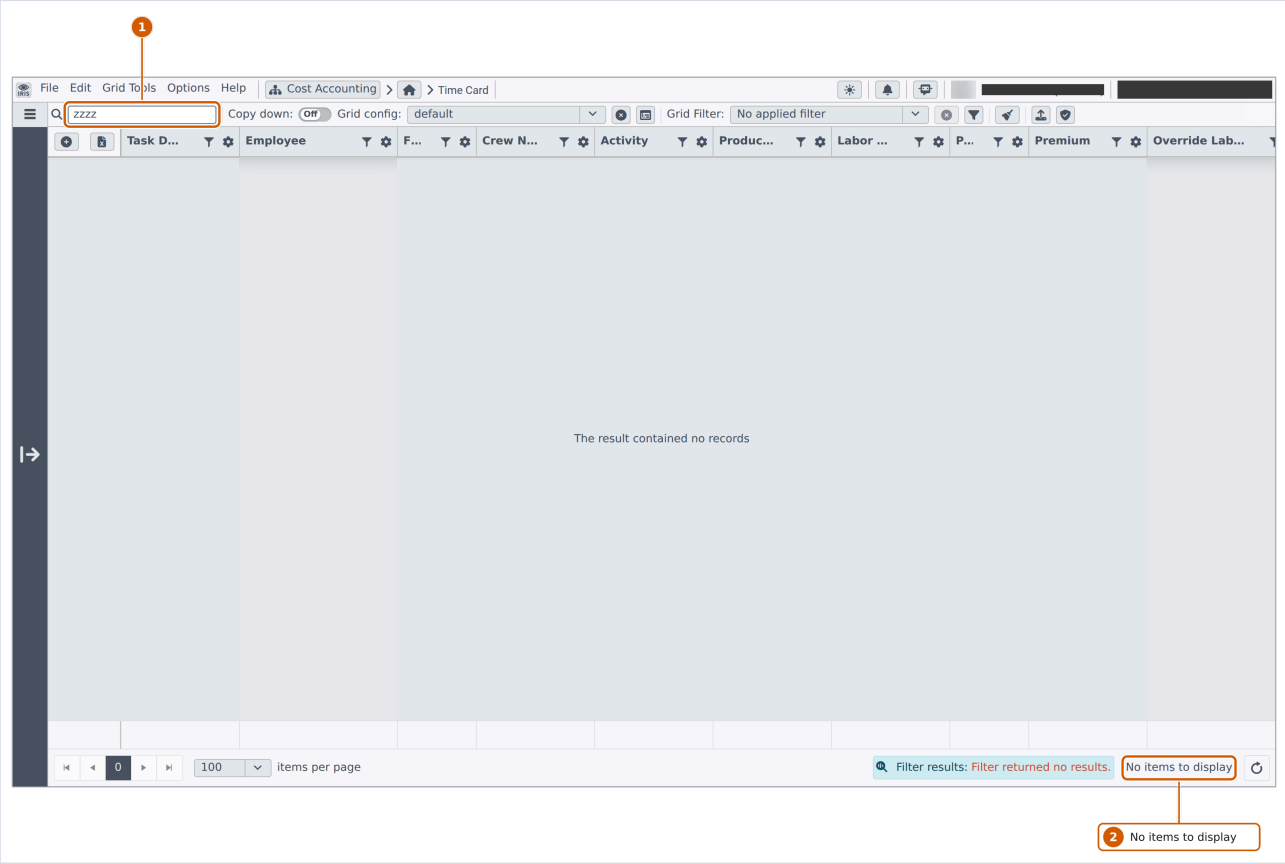
Choose how many rows to show on each page.

   1. Page sizes
   2. Page size choices
3. Choose the number of rows you want to see on each page.

Search the grid

1. Click the toolbar box that shows **Search the grid**.
2. Type the text you want to find.
3. Press Enter.

   The grid updates. If nothing matches, the pager shows `Filter returned no results.` and `No items to display`.



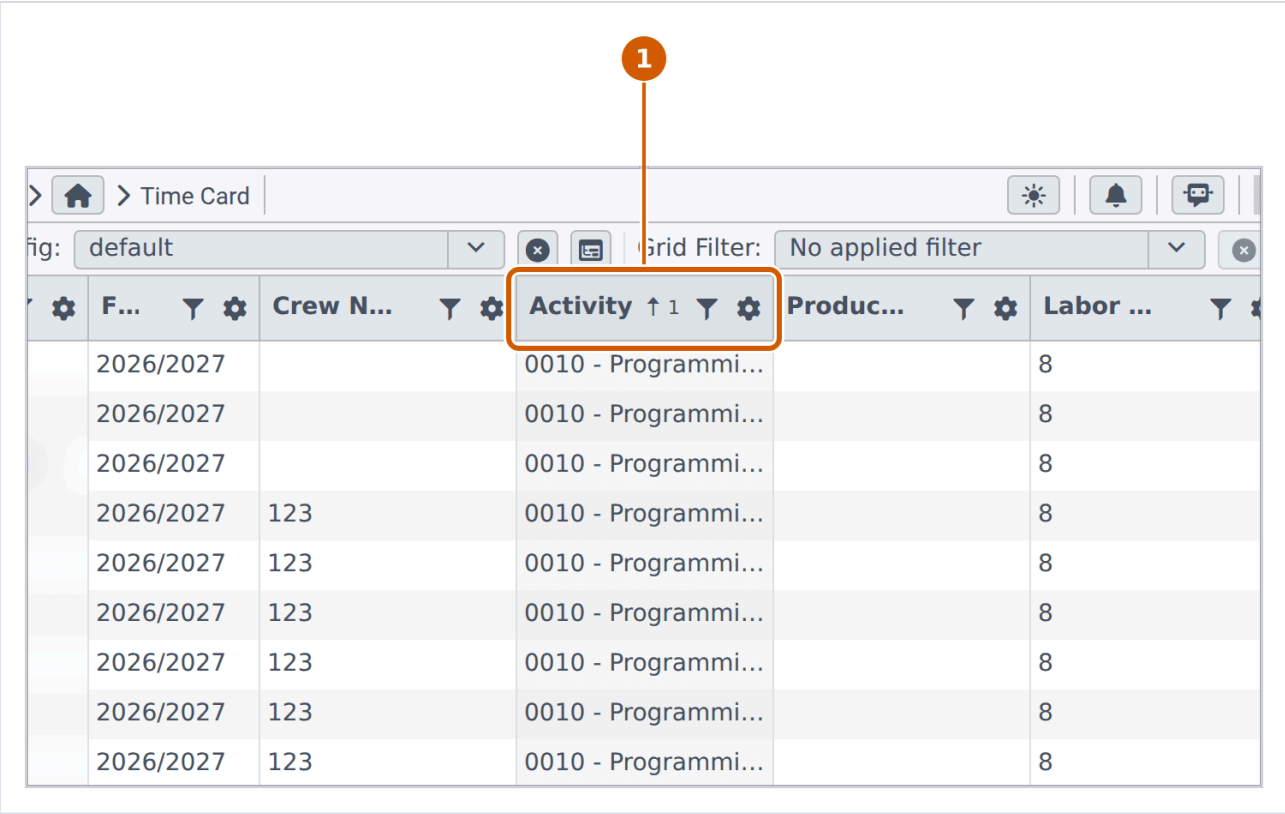
When a search finds nothing, the pager shows 'No items to display'.

1. Search text
2. No items to display

Sort by a column

1. Click a column heading, for example **Activity**.

   The grid sorts the rows in ascending order by that column, and the heading shows `1` next to the column name (for example `Activity 1`).



Click a column heading to sort by that column.

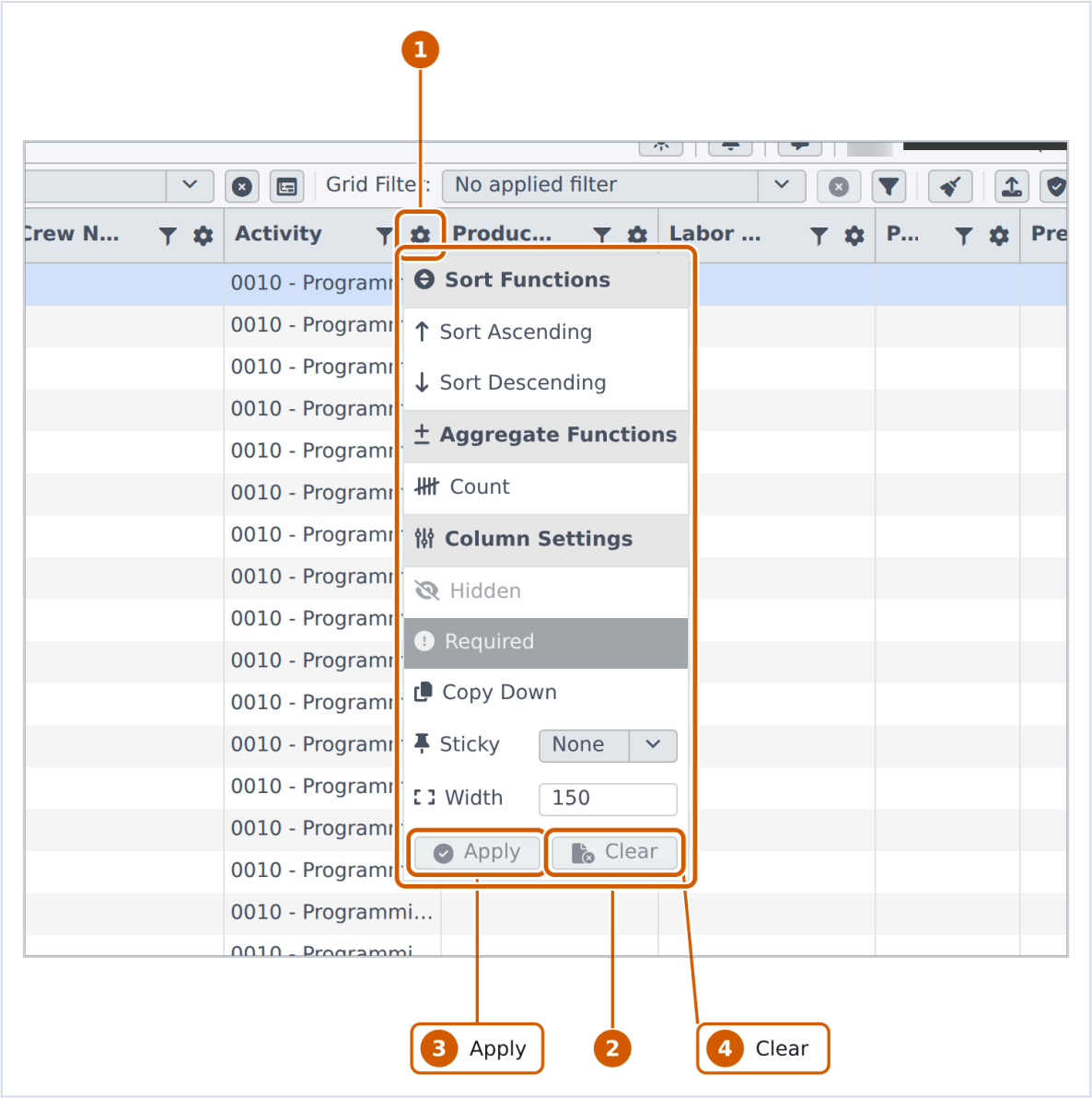
1. Sorted column (Activity 1)

2. To sort additional columns, click another column heading.

Open a column's menu

1. In the column heading, click the column menu icon. It has no text label.

   A menu opens with three sections: **Sort Functions** (Sort Ascending, Sort Descending), **Aggregate Functions** (Count) and **Column Settings** (Hidden, Required, Copy Down, Sticky, Width). It also has **Apply** and **Clear** buttons.



The column menu for Activity has Sort Functions, Aggregate Functions and Column Settings.

1. Column menu icon
2. Column menu
3. Apply
4. Clear

2. Choose **Sort Ascending** or **Sort Descending** to sort by this column.
3. To change a column setting, use the **Column Settings** section.

   Apply (tooltip: "Apply grid configuration.") and **Clear** (tooltip: "Clear grid configuration.") stay unavailable until you make a change.

> **Note:** For saving settings, see Grid configurations.

Start working with records

The toolbar also has a **Bulk delete mode** button (tooltip: "Click to enter bulk delete mode."). For details on working with records, including bulk delete, see Grid viewing and editing.

1. To add a record, click the add button above the grid. Its tooltip is "Add new record. (ctrl shift a)".
2. To change a record, click the row's "Edit record (ctrl+shift+e)" button.

   The record opens in a pop-up window for editing.
3. To copy a record, click the row's "Duplicate record" button.
4. To remove a record, click the row's "Delete record" button.

   IRIS10 asks "Are you sure you want to delete this record?" before it deletes anything.

   > **Note:** You can delete only if your security level allows it. IRIS10 checks this when you delete. If you cannot delete, ask your administrator.

Reference

Grid toolbar and row controls (Time Card example)

CONTROL	ON-SCREEN LABEL OR TOOLTIP	PURPOSE
Search box	Search the grid	Type text and press Enter to search the grid.
Grid filter drop-down	Grid Filter:	Choose a grid filter (see Grid filters).
Grid configuration drop-down	Grid config:	Choose a grid configuration (see Grid configurations).
Add button	Add new record. (ctrl shift a)	Add a new record.
Bulk delete button	Bulk delete mode (tooltip: Click to enter bulk delete mode.)	Enter bulk delete mode.
Row button	Edit record (ctrl+shift+e)	Edit the record in a pop-up window.
Row button	Duplicate record	Copy the record.
Row button	Delete record	Delete the record after confirmation.
Row button	Click to view the cell contents.	View the cell contents.

Page sizes

GRID TYPE	PAGE SIZES OFFERED
Main grid	100, 250, 500, 750, 1000
Child (nested) grid	5, 10, 50, 100, 150, 200

Column menu contents

SECTION	ITEMS
Sort Functions	Sort Ascending, Sort Descending
Aggregate Functions	Count
Column Settings	Hidden, Required, Copy Down, Sticky (shows `None`), Width
Buttons	Apply, Clear

What you can do on the main grid

CAPABILITY	AVAILABLE
Sort by more than one column	Yes
Resize columns	Yes
Reorder columns	Yes
Select rows	One row at a time
Group rows by column	No (Time Card)

Tips and notes

Tip: Keyboard shortcuts appear in the tooltips: ctrl shift a adds a record, and ctrl+shift+e edits a record.

Note: Grids that track notes show a **Notes** column, which you cannot sort by. Most of these grids also show a **Documents** column.

Note: If a search finds nothing, the pager shows `Filter returned no results.` and `No items to display`.

Important: Deleting a record always asks for confirmation first. Read the message before you continue.

Note: Main grids use larger page sizes (100 to 1000) than child grids nested inside a record (5 to 200).

Related topics

- Grid viewing and editing
- Grid configurations
- Grid filters
- Navigating portals and pages