



PURPOSE:


In DEACOM the report or list that is generated via the pre-filter is referred to as a grid. Grids can be customized by user, user group, or all users.

PROCESS STEPS:

1. Run the report you wish to customize
2. Click the ellipsis button (the 3 dots next to the filter box)
3. Click Grid Layout
4. Click Add
5. Click on the down arrow on the Field Name line.
6. Double click the field you wish to add (see notes below)
7. Enter a Title
 - a. If the title you want doesn't exist; click the add button
8. Enter a Width
9. Enter an Input Mask if desired. This is normally used when displaying numerical values. The most common input mask is 999,999,999.99
10. Click Sum if you want to add the values
11. Click Save
12. Exit the "Edit Grid Column" screen
13. Click Save. NOTE: Click Sort to open the "Sort" screen and re-arrange the order of columns, and Save.
14. Exit the "Edit Grid Layout" screen
15. Exit out of the grid
16. Re-run the report

Note: There are 2 ways to find any field name in DEACOM.

1. Clicking Ctrl+Shift and Right Click and releasing all at the same time.

Note: Click on "Options" note icon  to see list of items in a drop-down list & the code for each.

2. Navigate to System > View Data Dictionary

Copy Grids from one user to another: The desired grid will be used as a source to create a new grid for a User that has no specific Grid For.

1. Go to Grid Layouts (System > Maintenance > Grid Layouts)
2. Highlight the desired grid to be copied. (Note the Grid For column shows the Username.)
3. Click New
4. Notice the Grid Layout below has the settings from the "copied User Grid".
5. Change Grid For to "Specific User"
6. Change the User to [Select a User]
7. Click Save



Grid Layouts

SOP 277

Revision F, 10/30/2020

Approved by: Don Stanton

User Defined Columns on Grids: The user defined column allows you to do calculations or pull in information from another report.

1. Follow steps 1-5 above
2. Click the User Defined line
3. Enter the expression in User Expression field.

Note: Example Expressions:

Add "Facility" to S.O. grid = SQLVAL("wa_name", "dmware, dmprod", "wa_id = " + ALLT(STR(bi_waid, 11)), "S"),

Add "Division" to grid = SQLVAL("s2_name", "dms02", "s2_id = " + ALLT(STR(sh_s2id)), "S"),

or IIF(pastdue < 46, VAL(TRANS(balance, "999,999,999.99")), 0),

Add Confirmation Number to Orders to be Invoiced grid = SQLVAL("tp_ref2", "dtpur", "tp_purnum = " + TRANS(tp_purnum), "S")

Add Purchase To Acct to Item Master: SQLVAL("LEFT(ch_account, 4) + '-' + SUBSTRING(CAST(ch_account as varchar), 5, 2) + '-' + SUBSTRING(CAST(ch_account as varchar), 7, 3)", "dmchrt", "ch_id = " + ALLT(STR(pr_invchid)), "S")

4. Follow lines 7-16 above

REVISIONS

| Rev | Date | Change |
|-----|----------|---|
| I/R | 10/23/17 | New |
| A | 4/27/18 | Change Button names, add NOTE to re-arrange column order. |
| B | 8/29/18 | Add note about drop-down list codes |
| C | 9/10/18 | Add note for User Expression |
| D | 9/3/19 | Add instructions to Copy Grid Layout to another User |
| E | 2/6/2020 | Add another SQLVAL sample and color code |
| F | 10/30/20 | Change to v16 Menu names |