



SSIS Fiscal

Grid Options in SSIS

August 2023



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Grid options in SSIS offer a way to manage data and organize information. They are available on almost every grid in SSIS and can be used to create specialized ad-hoc reports, customize a view, and export data from a grid to another program outside SSIS. This document covers available grid options by task. Refer to the screenshots to customize grids and grid reports in SSIS.

Customized grid settings are saved until the next time changes are made to the settings or grid defaults are restored. Exceptions to this are:

- if a grid is customized and no results display:
 - settings are not saved.
 - Any Manage Grid Setting Views created are not saved.
- Results must exist in a grid for settings to save.
 - **Example:** When the User Activity Log is opened there are no results in the grid, but the grid column names display, and grid options are available. If changes are made to the grid without results displaying changes are not saved. When results are displayed, changes go away and are not saved, even if a new saved view is created using Manage Grid Settings.

Grid Options Available Without Grid Menu

Some display options are available to move columns without having to access the Grid menu:

- **Reposition/Move Column** – Allows the user to change the order in which columns display in the grid.
- **Add and/or Remove Columns** – Allows the user to add additional columns or remove columns from displaying in the grid.


To Reposition a Column:

1. Click on the column header to be moved and hold the left mouse button down.
2. Drag the selected column to the new position and release the button when the double green arrows



display.

To Add and/or Remove a Column:

1. After clicking the **Column Header** button , click the **check boxes** next to a column name to add or remove the column from the grid.
2. The added columns will display after the last column in the grid.

Columns can also be removed by using the “Toss Away” feature. Click the column header and drag the column off the grid and unclick the mouse button. The column is sent to the column header listing.

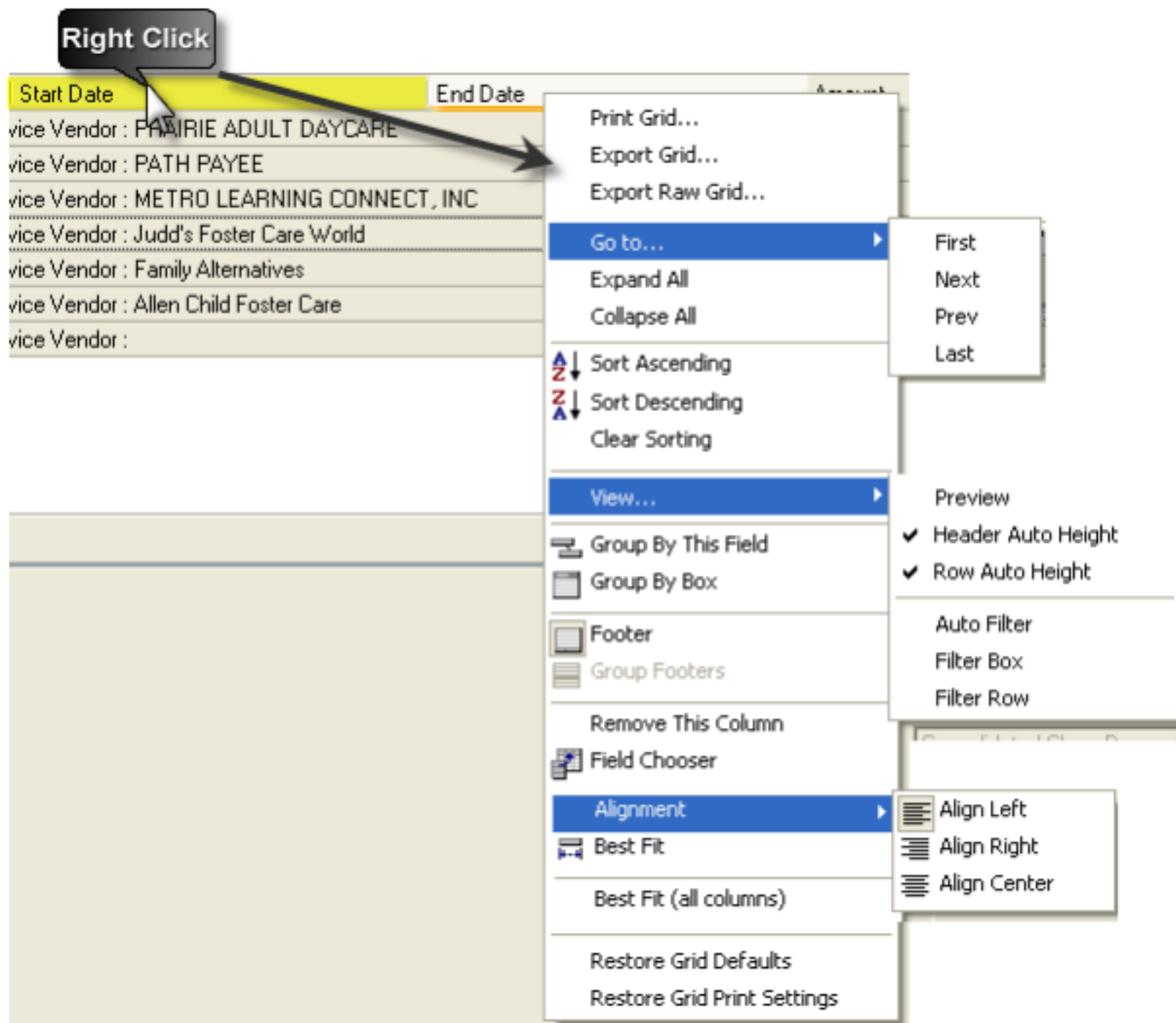
Descriptions of Grid Menu Options

Access Grid Menu

Grids can also be customized by accessing the Grid menu. Use the menu to customize the way grids display and to set up weekly, monthly, or quarterly reports.

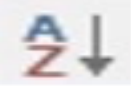

To access the Grid menu, right-click within a column header in a grid.






Grid Menu




The table below lists grid options, descriptions, and page references (if applicable) for additional steps to more detailed instructions in this document.

Grid Option	Definition	Page
Print Grid	<p>Select the Print Grid option to display the grid in a print preview window. The grid will print as it displays with any filtering, footers, search criteria, etc., selected.</p> <p><i>Refer to the Print Options for Grids and Grid Reports Job Aid for additional options available in the print preview window.</i></p>	
Export Grid	<p>Use the Export Grid option to transfer data currently displaying in the grid to another program like Excel. File types include Hypertext Markup Language (HTML), Excel, Text, and Extensible Markup Language (XML). If the Export Grid option is not available, use the Export Raw Grid option.</p> <p><i>Export Grid only includes data and columns currently displaying on the grid.</i></p>	7
Export Raw Grid	<p>Use the Export Raw Grid to transfer data in the grid to another program like Excel. Raw data includes information and columns that are not included in the current display.</p> <p><i>Export Raw Grid option includes all formatting for the report.</i></p> <p><i>Example: A Date field displays as a month, day and year, but could also include hour, minute and second.</i></p>	7
Go to	<p>Use the Go to option to navigate quickly within the grid. Options include:</p> <ul style="list-style-type: none"> • First - Selects the first line in the grid. • Next - Selects the next line in the grid. • Previous - Selects the previous line in the grid. • Last - Selects the last line in the grid. <p><i>Using the Go to option does not change the highlighted row in the grid. The preview window below the grid displays the row "first, next, previous or last".</i></p>	
Expand All	<p>If items in the grid are grouped, this option allows lines in the grid to be expanded.</p>	

Grid Option	Definition	Page
	<p><i>Refer to the Group by This Field and Group by Box to learn how to group a grid in SSIS.</i></p>	
<p>Collapse All</p>	<p>If items in the grid are grouped, this option allows lines in the grid to be collapsed.</p> <p><i>Refer to the Group by This Field and Group by Box to learn how to group a grid in SSIS.</i></p>	
<p>Sort Ascending A-Z</p> 	<p>Arranges data from A to Z, or from 0 to 9, under the column header selected. i.e., A grey arrow displays in the column header pointing up.</p>	
<p>Sort Descending Z-A</p> 	<p>Arranges data from Z to A, or from 9 to 0, under the column header selected, i.e., A grey arrow displays in the column header pointing down for descending.</p>	
<p>Clear Sorting</p>	<p>Click on a column to sort the grid by that column header in ascending or descending order. If a column is sorted a light grey arrow displays in the column either pointing up or down.</p> <p><i>To clear the ascending or descending sort select Clear Sorting.</i></p>	
<p>View</p>	<p>Allows the view of the grid to be changed.</p> <ul style="list-style-type: none"> • Preview - Use to view all proofing messages within the grid. <i>Refer to Page 9.</i> • Header Auto Height - Column text wraps and auto sizes the column headers. • Row Auto Height - Text wraps and auto sizes the row. Select to remove text wrapping. • Auto Filter - Displays the drop-down filter arrows in the column headers. <i>Refer to page 9.</i> • Filter Box - Displays the grey Filter box below the grid. <i>Refer to page 11.</i> • Filter Row - Displays a Filter Row below the column headers. <i>Refer to page 16.</i> 	

Grid Option	Definition	Page
	<p><i>Filter Builder is available when the Filter Box from the View option is selected. Filter builder allows multiple line filters to be entered.</i></p>	
<p>Group By This Field</p> 	<p>Groups by the selected column header selected by right-clicking.</p> <p><i>Use the Group by Box option to group by column headers. The drag and drop method can be used.</i></p>	<p>16</p>
<p>Group By Box</p> 	<p>Displays the Group by Box if it is not defaulted to display.</p> <p>Hides the Group by Box if it is defaulted to display.</p>	<p>17</p>
<p>Footer</p> 	<p>Select Footer to display a footer at the bottom of the report. The footer displays information based on the values in the columns and hides the Footer if it is defaulted to display.</p>	<p>18</p>
<p>Group Footers</p> 	<p>Select Group Footers to display a footer below each grouped level in the grid. Allows comparison between group footers and the footer of the report.</p> <p><i>This option only displays if the grid is grouped by a column header.</i></p>	<p>18</p>
<p>Remove this Column</p>	<p>Removes the column right clicked on from the displayed results.</p> <p><i>Use the Column Header button on the far left of the grid to add/remove columns in the view.</i></p>	
<p>Field Chooser</p> 	<p>Use to display the list of additional columns available for the grid. Use the drag and drop method to pull in and remove column headers to the display in the grid.</p>	
<p>Alignment</p>	<p>Use to align the data in the selected column. Alignment options include:</p> <ul style="list-style-type: none"> • Align Left • Align Right • Align Center 	

Grid Option	Definition	Page
	<i>Alignment is only available for Date fields.</i>	
Best Fit 	Broadens or narrows the selected column automatically depending on monitor and window size.	
Best Fit (all columns)	Broadens or narrows all columns currently displaying on the report based on monitor and window size	
Manage Grid Settings	Select to view a list of system layouts for the grid and create personalized layouts. (Previously known as Save Configuration) After customizing a grid layout (grouping, footer, filter, etc.) use Manage Grid Settings to save settings.	18
Restore Grid Defaults	Select to restore grid settings to the system defaults.	
Restore Grid Print Settings	Select to restore grid print settings to the system defaults. Refer to the Print Options for Grids and Grid Reports Job Aid for additional options available in the print preview window.	

Additional Steps and Detailed Instructions

Export Grid

Use the Export Grid option to transfer report data to another program like an Excel spreadsheet. Report data using Export Grid include only the data and columns that are selected.

The file types that can be exported include HyperText Markup Language (HTML), Microsoft Excel, Text (comma delimited) and Extensible Markup Language (XML). Most exporting of grids is done to an .exe file or to Microsoft Excel.

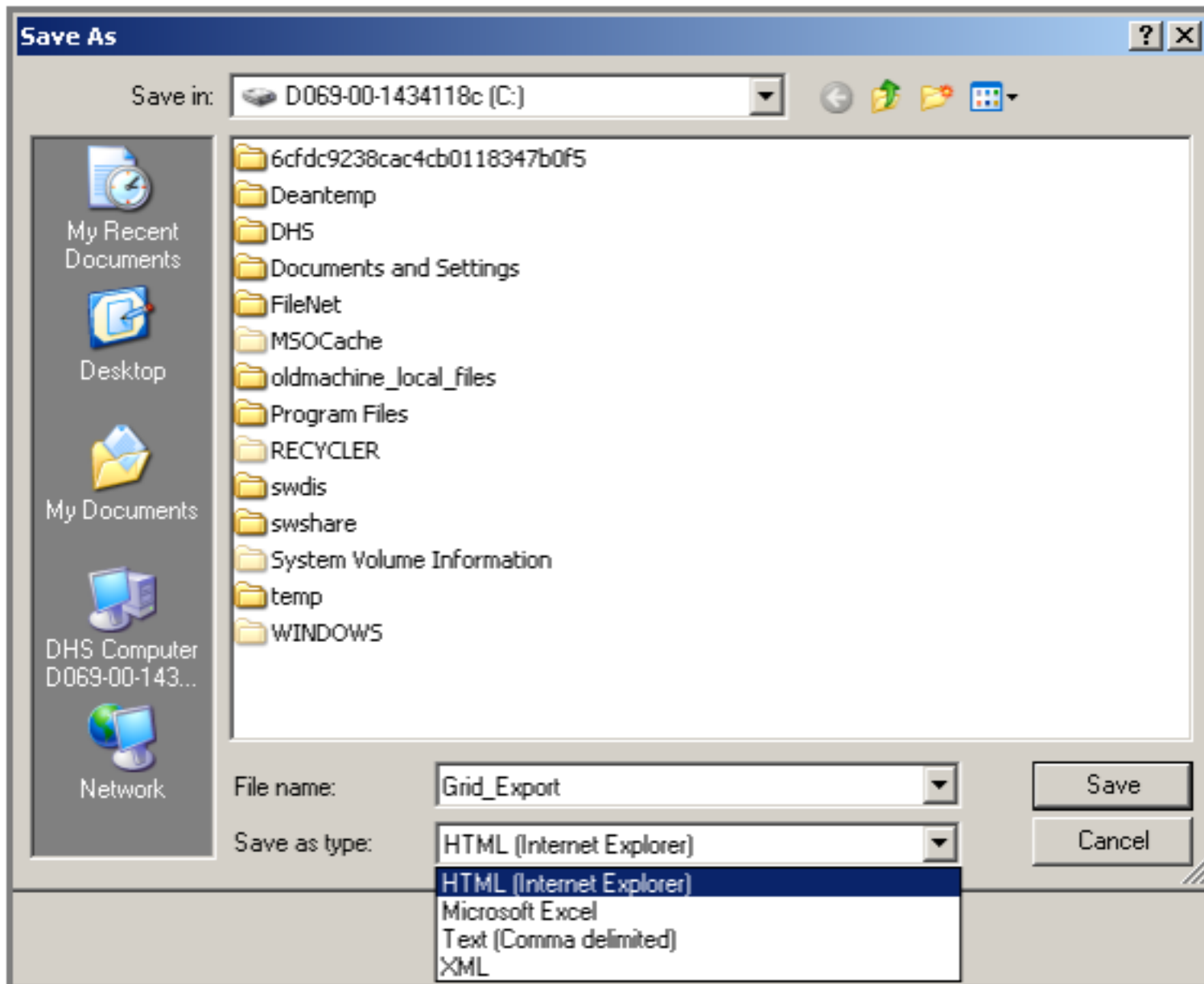
Export Raw Grid

Export Raw Grid transfers all the data in the report to another program like Microsoft Excel. Raw data includes all information available in the report. It includes information and columns that may not display in the report

depending on the filters selected. When exporting a raw grid, all data will be included that is held in the tables of the application.

For example: The Finalized Date field displays as month, day, and year but the table also holds the hour, minute and second. Export Raw Data includes the hour, minute and second.

Save As Dialog Box




To Export Grid or Export Raw Grid:

1. From the Grid Options menu select **View**, then **Export Grid** or **Export Raw Grid**
2. The **Save As** dialog box displays.
 - Select the desired export location in the **Save in** field and name the new file in the **File name** field.
 - Select the type of file in the **Save as type**: drop-down menu.
3. Click **Save**.

View

The View option in the Grid menu provides additional menu options to allow users to have grids display in different ways. This provides opportunities for further customization of grids.

Preview

ini	Client Name	Activity Date	Svc Code
	Hansard, Glen	01/05/2011 12:00:01 AM	193

Client: PMI # not found.

Proofing messages display in grid

Preview allows users to view proofing information in addition to the grid data. Additionally, proofing information can be printed or exported with the grid data.

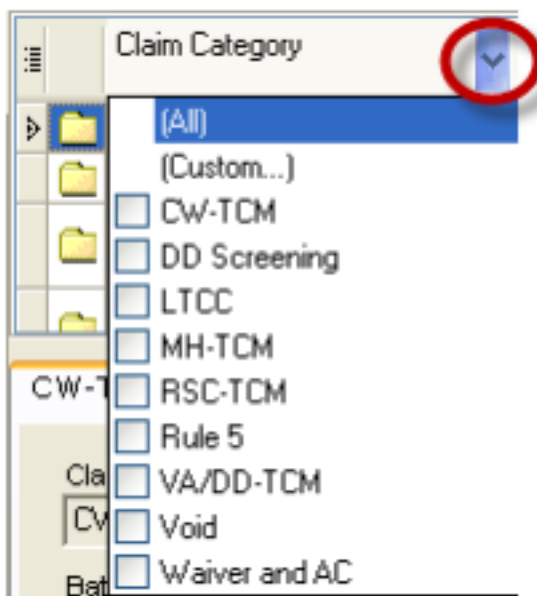
To Preview the Proofing Messages in Grid:

1. From the Grid Options menu select **View** and select **Preview**.
2. The Proofing Messages display in the grid.
 - Group By worker and print grid to create a proofing report for workers.

Hints:

- Preview is a Fiscal Function and only displays as an option on proofing tabs.
- Proofing is used in the Payment Batch Edit Report, Claim batches, and State Reports.
- Use the Preview option to print proofing reports for workers. Use the Group By option to group messages by worker.

Auto Filter




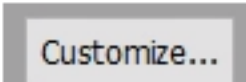


Use Auto Filter to display specific data. It can also be used to remove or hide unwanted data on the grid. Use Auto Filter to run specialized weekly, monthly, quarterly, or yearly reports from a grid in a search. When Auto Filter is selected, each column header displays a filter drop-down arrow.

To Auto Filter a Column:

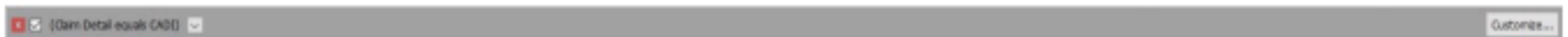
1. From the Grid Options menu select **View** and select **Auto filter**.
2. Hover the mouse over the column header to filter; a Filter dropdown arrow displays.
3. Click on the **Filter arrow** and **Check** or **Uncheck** the items to be viewed in the grid.
4. The **Filter bar** displays at the bottom of the grid.
5. Repeat for additional columns if applicable.



- Click the  button to remove the filters applied.
- Click the  check box next to a filter to apply or deselect that filter.
- Click the  drop-down arrow to display the last 25 filters used.
- Click the  button to access the Filter Builder.

To Use the Custom Filter Option:

1. Click the **Custom** options from the drop-down filter menu.
2. Select an **indicator** (e.g., like), and then enter the parameters next to the drop-down menu.
3. Select **And** or **Or**.
4. Select an **indicator** (e.g., equals), if applicable, and then enter in parameters next to the drop-down menu.
5. Click the **OK** button.
6. The Filter bar displays at the bottom of the grid. Repeat for additional columns if applicable.



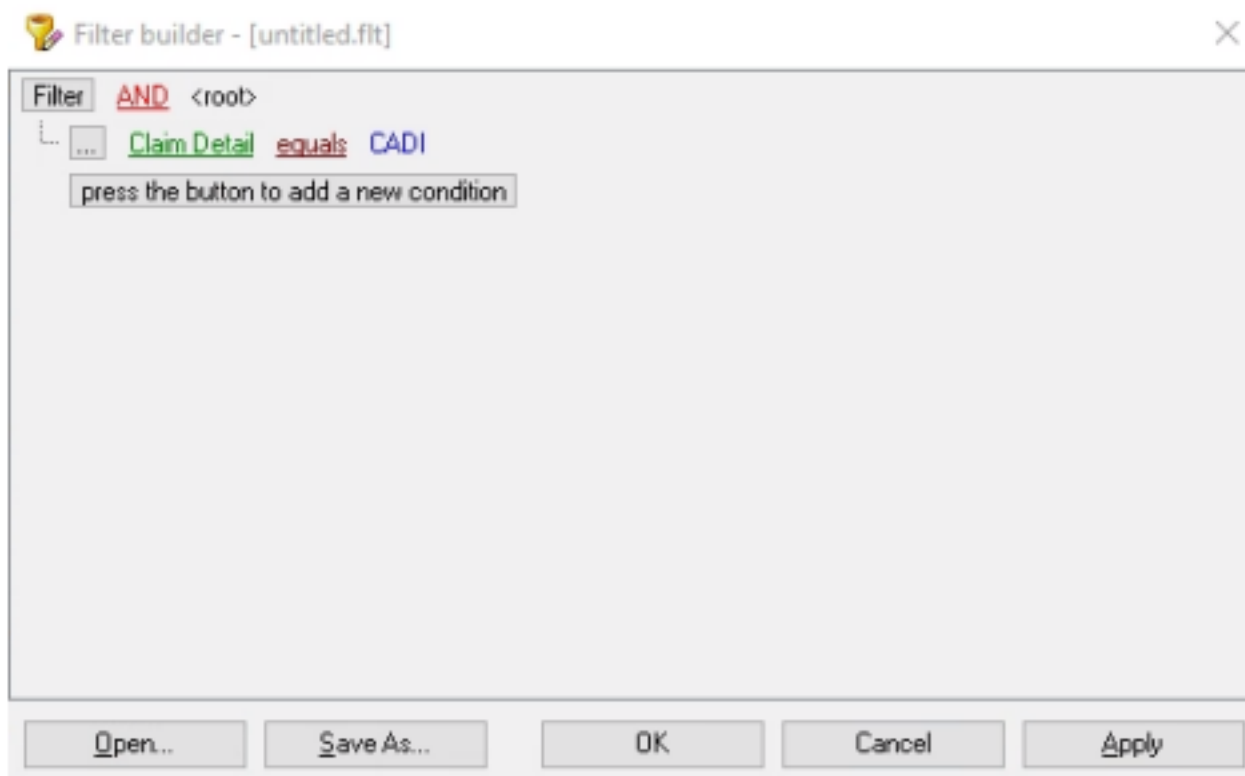
Hints:

- String choices by using the Filter Builder.
- Use the table below for a description of additional conditions/filters that can be used on the filter builder.

Table – Filters/Conditions Available for Custom Filter

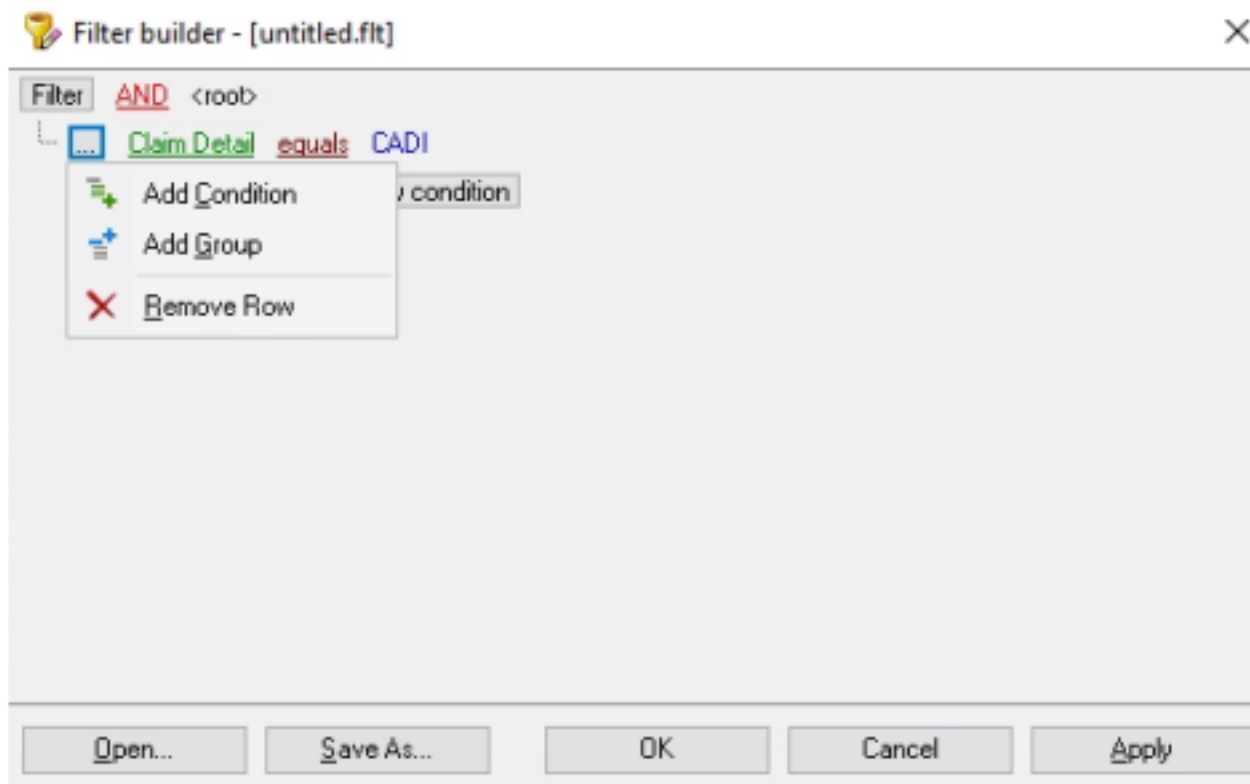
Condition or Group Name	Description
Equals	=
Does Not Equal	<>

Condition or Group Name	Description
Is Less Than	<
Is Less Than or Equal To	<=
Is Great Than	>
Is Greater Than or Equal To	>=
Is Like	Like
Not Like	Not like
Is Blank	= NULL
Is Not Blank	< > NULL



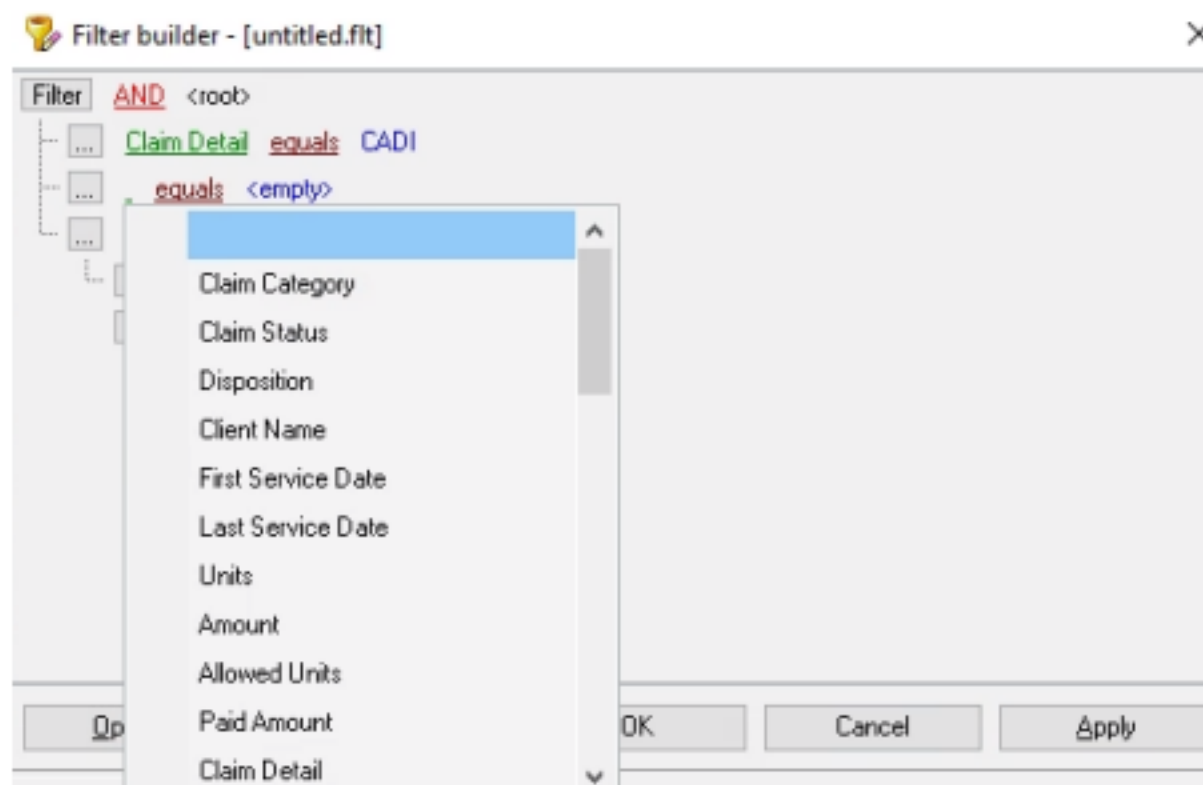
To Use the Filter Builder to Create Multiple Filters:

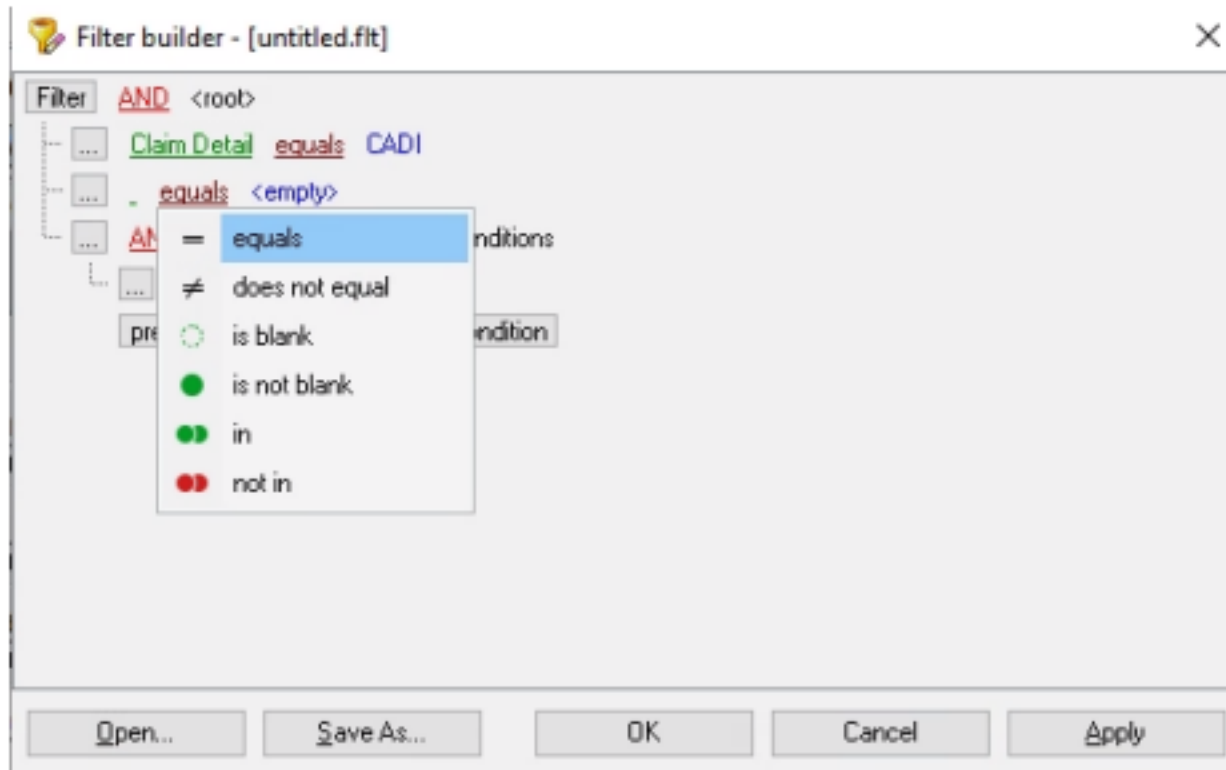
1. Click the **Customize** button in the grey Auto Filter banner.
2. Click **Filter** or an icon indicator to **Add Condition, Add Group, Clear All** or **Remove Row**.




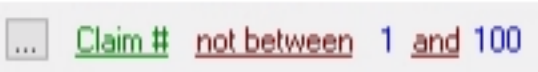
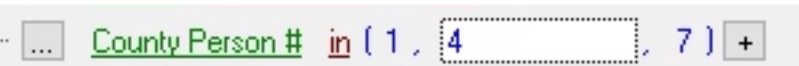
3. Complete the **Condition** or **Group** to filter by.

- Click on the dash to get column headers to filter by.
- Click on the Filter condition.
- Click on dash to enter a condition.
- Click the press the button to add a new condition button, if applicable.

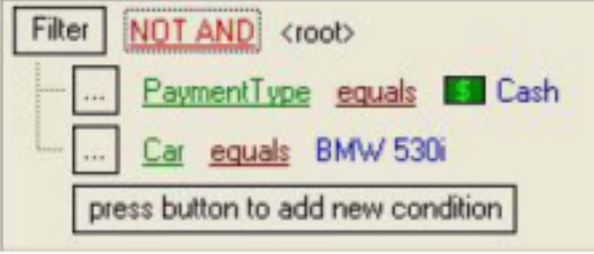
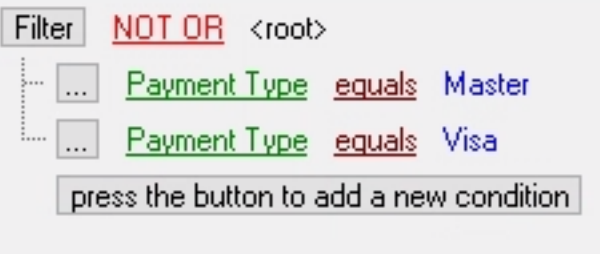




4. Click the **OK** button.
 - Click **Open** to open an existing filter, if applicable.
5. Click **Save As** to save the active filter as a file on the computer.
 - Helpful for requested ad-hoc reports
6. Click **Apply** to preview changes.

Condition/Filter	Description
Between	Allows the user to select record values between the range entered on the between filter builder line ID>=1 AND ID <=100 . 
Not Between	Allows the user to select record values not included in the range entered on the not between filter builder line ID>1 AND ID >100 . 
In	Allows the user to select records if the value is a member of the specified set entered on the in filter builder line ID=1 OR ID=4 OR ID=7 . 

Condition/Filter	Description
<p>Not In</p>	<p>Allows the user to select records if the value is not a member of the specified set entered on the not in filter builder line ID<>1 AND ID<>4 AND ID<>7.</p> <p>... <input type="text" value="County Person #"/> not in (1 , 4 , 7) <input type="button" value="+"/></p>
<p>Date/Time</p>	<p>This group of filters is available only for date/time columns. They include:</p> <ul style="list-style-type: none"> • is yesterday • is last month • is next week is today • is last year • is next 14 days • is tomorrow • is past is next two weeks • is last 7 days • is this week • is next 30 days • is last week • is this month • is next month • is last 14 days • is this year • is next year • is last two weeks • is next 7 days • is future • is last 30 days <p>... <input type="text" value="First Service Date"/> is today</p>
<p>Not and</p>	<p>Allows selected records to display by combining conditions by the and filter/condition and then negates the result. In the example below, the grid would not display BMW 530i paid with cash. It would display BMW 530i's paid for by other means. NOT (Car='BMW 530i' AND Payment Type=Cash).</p>

Condition/Filter	Description
	
<p>Not or</p>	<p>Allows selected records to display by combining conditions by the or filter/condition and then negates the result. In the example below, the grid would not display results paid using Master or Visa. NOT (Payment Type=Master OR Payment Type=Visa).</p> 

Filter Row

Service County Vendor #	Payee Vendor	Client Name
Start Entering Here		

A filter row is an alternative to filter drop-downs. A filter row provides two ways of filtering:

1. Type ahead feature runs off “Exact Match.” As characters are typed, an in-place editor automatically completes the values in that column with the field value containing similar starting characters.
2. Wildcard search used the “Like Match.” If an * (asterisk) or _ (underscore) are entered.

To Use Filter Row

1. From Grid Options select **View**, then select **Filter Row**.
2. The Filter Row displays below the column headers.
3. Click in the **filter row** below the **column** to be filtered.
4. Begin **typing** the filter to be applied to the grid.
 - The Filter row has the type-ahead feature.
 - Use the **Wildcard Filter/Search** to filter “Like Match.”
5. Press **Enter** when desired filter is entered into the Filter Row.
6. Filter is applied to the grid and displays in the Filter Bar.

Hints:

- The Filter Row is NOT case sensitive.
- When using the type ahead feature, it is exact match, not starts with. Use the steps below for a Wildcard filter to apply a “Starts with” or “Like” filter.

What is a Wildcard Filter/Search?

A wildcard is a symbol that takes the place of an unknown character or set of characters. SSIS uses the asterisk (* - shift 8) symbol. Use an asterisk to find all records matching a partial filter. Create a “Starts with” or “Ends with” filter by using an asterisk.

For example, when cheese* is entered as the filter term, the grid would display:

- Cheese
- Cheesecake
- Cheesedip

If *cheese was entered as the filter term, the grid would display:

- Stringcheese
- Swisscheese
- Slicedcheese

Group By this Field

Payment Type	Service Start Date	Service End Date	Svc Code	Payment Status
Service Vendor : Acme Foster Care, Rosemount, Minnesota				
Client Name : AARF, Mary				
Posted payment	01/01/2010	01/01/2010	105	Paid
Service Vendor : ADULT DAY SERVICES OF BEMIDJI				
Service Vendor : Alternative Care Provider				
Service Vendor : April Anderson Family Foster Home				

The Group by This Field option allows items to be grouped by one or more selected columns. Create a customized report for the data in the grid by grouping fields.

To Group by a Specific Column:

1. Right-click on the column header to group by and select **Group by This Field**.
 - The Group by Box displays above the column headers.
2. To add subgrouping of columns, repeat step above.

Hint: To change the order of the grouping, click and drag the column headers in the Group by Box to the order desired.

Group By Box

Drag a column header here to group by that column

To Display Group by Box:

1. Right-click on the **column header** to group by and select **Group by Box**.
2. Click on a **column header** and drag into the Group by Box until the **double green** arrows appear then drop.

Hint: Use the Expand All or Collapse All option on the Grid options menu to expand or collapse the grouped rows in the grid.

Footers and Group Footers

Service Vendor △				
	Service Start Date △	Service End Date	Amount	Svc Code
	05/14/2007	05/14/2007	\$315.00	105
	Min: 5/14/2007	Max: 5/14/2007	\$315.00	Count: 1
Group Footer (Sub-totals)				
<input type="checkbox"/> Service Vendor : Deb Foster Care	01/01/2012	01/31/2012	\$145.44	101
	01/01/2012	01/31/2012	\$145.44	101
	01/01/2012	01/31/2012	(\$145.44)	101
	Min: 1/1/2012	Max: 1/31/2012	\$145.44	Count: 3

Footer →

The footer provides information (such as totals) regarding column selections. The report may or may not have a footer displaying by default. Selecting Footer either shows the footer, if it does not display by default, or hides the footer if defaulted to display.

Group Footers, also known as sub-totals, have the same options available in the footer submenu as listed above.

Not all footer options are available under every column.

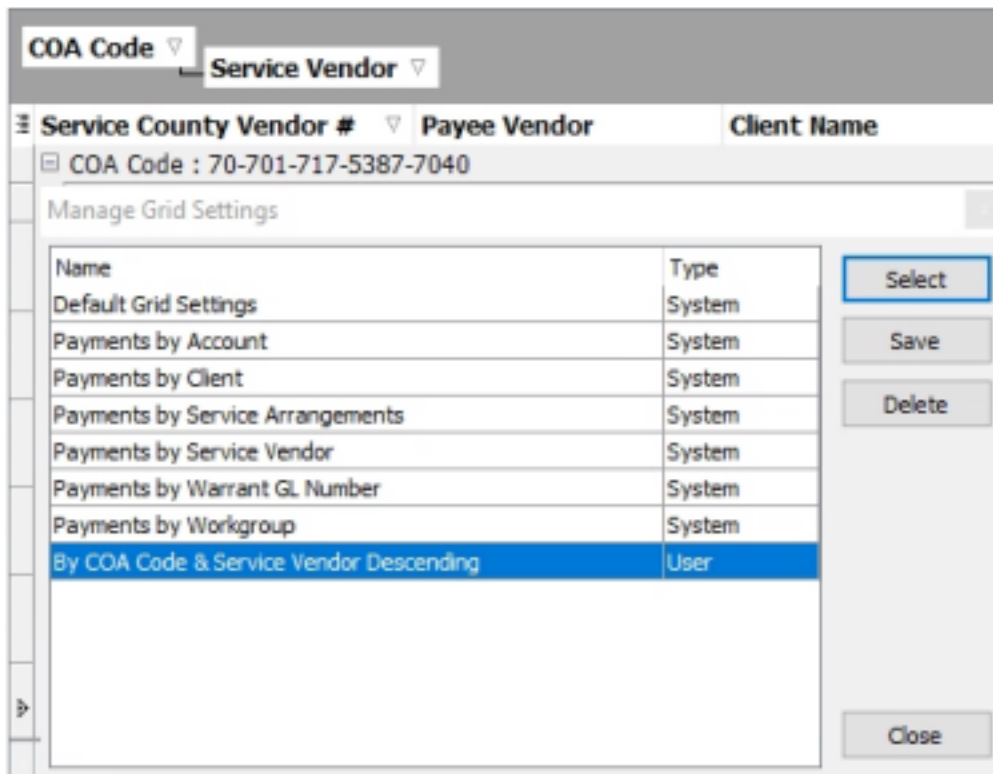
Footer Options:

- **Sum** - The total amount of the values in the column.
- **Min** - Displays the smallest value in the column.
- **Max** - Displays the largest value in the column.
- **Count** - The number of the values in the column.
- **Average** - Displays the sum divided by the count in the column.
- **None** - Clears any options selected from the footer options.

To Display Footer or Group Footer:

1. From the Grid options menu select **Footer** or **Group Footer**.
 - The Footer displays at the bottom of the grid.
 - The Group Footer displays at the bottom of each grouped row.
2. **Right-click** under the column to be viewed as a footer option.
3. Select the footer options desired: **Sum, Count, Min, Max, Average or None**.

Manage Grid Settings



Select to display a list of system layouts for the grid and create customized layouts.

There are two types of layout settings: system-defined and user-defined. The system-defined settings include the default layout and any additional layouts available across all counties/tribes. The user-defined settings are layouts to save for the grid. Layouts can be used to create weekly, monthly, quarterly, and yearly reports from any grid.

To Select a Layout for the Grid:

1. **Right-click** on a column header and select **Manage Grid Settings**.
 - The Manage Grid Settings dialog box displays.

2. Select the grid layout.
 - Click the **Select** button OR...
 - **Double-click** the layout to display in grid and the dialog box no longer displays.
3. The selected layout displays in the grid.
4. To **Close** the Manage Grid Settings dialog box.
 - Click on the **red X**.
 - Select the **Close** button.
 - **Click** anywhere on the grid.
 - Press **Esc** key.

Hints:

- Default layout for a grid is named Default Grid Settings.
- The Manage Grid Settings dialog box grid is sorted by Type and then by Name of the saved layout.
- Use the Tab key to move between the Select, Save, Delete and Close buttons.

To Create a New Saved Layout:

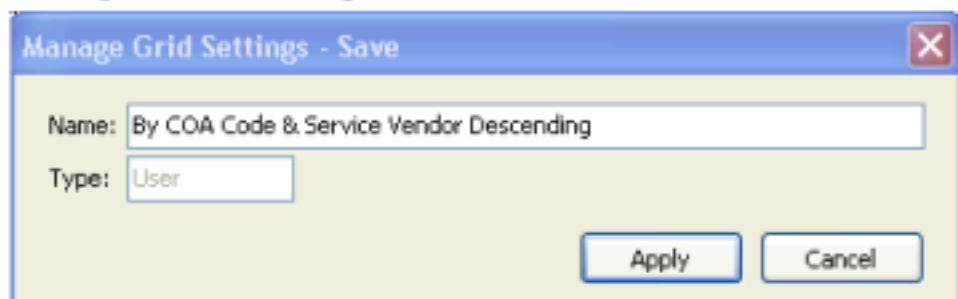
1. Use **Grid Options** (group by, sub-footer, filter, etc.) to create a customized layout of the grid.
2. **Right-click** on a column header and select **Manage Grid Settings**.
 - The Manage Grid Settings dialog box displays.
3. Click the **Save** button.
 - The Manage Grid Settings – Save dialog box displays.
4. Enter a **Name** for the new layout.
 - 75 Alpha-Numeric and Special Characters
 - The Name field cannot contain a comma or semicolon.
 - Name field is required and cannot be a duplicate of an existing layout name.
5. Click Apply (**Alt-A**) to create the grid layout.
 - A warning displays indicating the current layout will be overwritten. **“(Name) already exists; would you like to replace it?”**
 - Click **Yes** to replace the current layout.
 - Click **No** to go back to the Name field.
 - Click **Cancel** to no longer save the current layout.
6. Click **Cancel (Alt-C)** to no longer save the current layout.
7. **Close** the Manage Grid Settings dialog box.
 - Click on the **red X**.
 - Select the **Close** button.
 - **Click** on the grid.
 - Press **Esc** key.

Hint: Create a naming convention for user-defined settings.

- 75 Alpha-Numeric and Special Characters

- The Name field cannot contain a comma or semicolon.

Managed Grid Settings – Save



Manage Grid Settings - Save

Name: By COA Code & Service Vendor Descending

Type: User

Apply Cancel

To Modify or Edit a Layout:

1. **Right-click** on a column header and select **Manage Grid Settings**.
 - The Manage Grid Settings dialog box displays.
2. Select the **Name** of the grid layout and click the **Select** button or double-click the layout.
3. Use the **Grid Options** (group by, sub-footer, footer, etc.) to create a customized layout of the grid.
4. Click the **Save** button.
5. **Apply** to replace the old layout with the new layout.

To Delete a Layout:

1. **Right-click** on a column header and select **Manage Grid Settings**.
 - The Manage Grid Settings dialog box displays.
2. Select the **layout** to delete in the grid.
3. Click the **Delete** button.
4. Click **Yes** on the delete dialog box to Delete.