

A Comparison of various ways to Refresh, Reset, Filter, Search, and Sort GRIDS in Tanklogix Portal

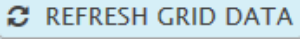
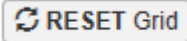

REFRESH GRID DATA, RESET GRID, REFRESH GRID DATA AND COLUMN FILTERS

Not all Grids throughout the Portal will have all three of these controls; some grids are editable, and others are not.

But as a general rule, these three controls govern the Refresh and Reset characteristics of the Portal Grids.

Why all these methods?

- To preserve sorting and filtering options you may have set, enabling you to still fetch new/refreshed data without resetting all of your filter and/or sort options.
- To give you flexibility to help you get the most out your grid data searching and viewing.

	REFRESH GRID Button	RESET GRID Button	REFRESH DATA GRID and COLUMN FILTERS link-button
(button or link)			
Calls database and checks for new data to refresh the Grid?	YES	NO	YES
Removes the column filtering values under each column label?	NO	NO	YES
Puts the Grid into Read-Only mode (if this is an editable grid)?	YES	YES	YES

MULTI-COLUMN SORT AND FLEXIBLE FILTER OPTIONS

Some grids will also have a blue funnel icon, just above the data grid:



When you click the funnel icon, a panel opens up that will show all sortable and filterable fields for that grid. For example, let's take the Disposal Customers page. When we click the funnel we get the follow panel to open (next page)

grid sort and filter options panel begin close

FILTER COLUMN	PATTERN	<input type="checkbox"/> USE DEFAULT SORT BELOW ?	ORDER
Customer ID	Contains ▼	1. Customer ID ▼	1. ASC ▼
Active ?	Exact Match ▼	2. ▼	2. ▼
Customer Name	Contains ▼	3. ▼	3. ▼
Contact	Contains ▼		
Address 1	Contains ▼		
Address 2	Contains ▼		
City	Contains ▼		
State	Contains ▼		
Zip	Contains ▼		
Phone	Contains ▼		
Fax	Contains ▼		
Email	Contains ▼		
Billing Reference	Contains ▼		

grid sort and filter options panel end

Each column can be configured for filtering and you may choose up to three sort fields for a multi-column sort. In the portal grids, the default is a single column sort, by clicking on the grid column header.

There are four filter-search patterns:

1. **Starts with** (the item you are searching must begin with what you key into the column filter)
2. **Ends with** (the item you are searching must end with what you key into the column filter)
3. **Exact match** (the item you are searching must match exactly with what you key into the column filter)
4. **Contains** (the item you are searching may be found anywhere in the spectrum left-to-right in the column value)

When the panel is closed, you can tell if the grid is using a default sort (which will always override any single-column clicking) by seeing the orange funnel. This default can be set by opening the panel and selecting the Use Default Sort Below checkbox, or by clicking the blue sort up-down arrow icon. (using the example of Driver Management below:)

SH DRIVER GRID DATA

EDIT Grid

RESET Grid

SAVE Selected Row(s)

DELETE Selected Row(s)



HMI TRANSMIT DRIVER INFO



nd filter options panel begin close

FILTER COLUMN

PATTERN

USE DEFAULT SORT BELOW

ORDER

Customer Name	Contains ▼
Customer ID	Exact Match ▼
Driver ID	Starts With ▼
Active	Contains ▼
Driver First Name	Contains ▼
Driver Last Name	Contains ▼
Driver Phone	Contains ▼
Driver Email	Contains ▼

1.	Customer Name ▼
2.	▼
3.	▼

1.	ASC ▼
2.	▼
3.	▼



ADDITIONAL GRID FILTERING GUIDES

On some grids, you will not have the funnel and sort up-down arrow icons; rather, you will see a link in the grid header column that will open up a flexbox” showing each filterable field, and the Starts With, Ends With, Exact Match, or Contains sorting (these columns have only one way to filter). This will also give some helps as to what some of the common search terms are for certain columns.



And example of this is the Disposal Locations page:

Disposal Locations Grid Filter Help (search column by exact phrase, begins with, ends with, contains)

Box ID.....	contains	Other.....	contains
Site Name.....	contains	Injection Authorization.....	contains
Gathering Facility.....	contains	Well Disposal Authorization.....	contains
Location.....	contains	Rate.....	exact
Distance From Nearest Town.....	contains	Authorization Disposal Method.....	contains
Lease Number.....	contains	System Serial Number.....	contains
Injection Into Reservoir.....	contains	Texas RRC Oil-Gas District Actual Site.....	contains
Injection Into Disposal Wells.....	contains	Texas RRC Oil-Gas District Tickets Default...	contains



Other pages may have a large enough range of columns, a PDF doc will be spawned to describe it: One example is the Ticket Transactions page:

There are many possible columns to sort and filter by in the Ticket Transactions Grid.

Please see [TICKET TRANSACTIONS GRID : SEARCH-FILTER-SORT](#)

for an explanation of options in using the filtering and sorting features of this grid.



Clicking on the link above will open up the pdf: (*next page)

Grid Column	Edit?	Sort?	Search?	Search Pattern - example	Valid Cell Display Values
Accounting Code	yes	yes	yes	selection: "tick", "inf", "miss", "ill"	Blank,Illegible,Missing Info, Missing Ticket
Actual Volume	no	yes	yes	exact match	many
Complete Lease-Well Match	no	yes	no	possible future use	none for now
Create Edit Date	no	yes	no		many
Created By/ Edited By	no	yes	yes	contains	many
Customer Name	no	yes	yes	contains	many
CustomerID Driver ID	no	yes	yes	contains	many
Disposal Lane	no	yes	yes	exact match	integers: 1 through n
Driver Name	no	no	no	(sort defaults to Ticket Start Time - descending)	many
Entered Lease Name	no	yes	yes	contains	many
Lease Number	yes	yes	yes	exact match	many
Lease Number Full	no	yes	yes	exact match (leading zeros are important)	many
Lease Type	yes	yes	yes	exact - "oil" "gas"	Oil, Gas
Notes	yes	yes	yes	contains	many
Produced Water	yes	yes	yes	selection: Y,Yes,T,True,N,No,F,False	checkbox
Production Ticket ID	no	yes	yes	exact match	many
RRC District	yes	yes	yes	exact match (with leading zero if needed)	01,02,03,04,05,06,6E,7B,7C,08,8A,09,10
RRC Lease Name	no	yes	yes	contains	many
RRC Lease Verified	no	yes	yes	selection: no, n, yes, y	NO, YES
RRC Operator Name	no	yes	yes	contains	many
Ticket Batch Tag	yes	yes	yes	contains	many
Ticket Image Count	no	yes	yes	exact match	numbers: 1 through n
Ticket Image Status	no	yes	yes	selection: single, multiple, pending, missing	blanks,single, multiple, pending, missing
Ticket Number	yes	yes	yes	exact match	many
Ticket Origin	no	yes	yes	exact match: TAN,PLC,MAN,CSV	TankWarden, PLC, Manual, CSV
Ticket Start, Stop time	no	yes	no		many
Ticket-Driver Image Link	no	no	no	view - just click on link	many values in the Link
Volume (BBLs)	yes	yes	yes	exact match	many
Water Type	yes	yes	yes	exact match	Unidentified,Pit,Flow Back, Produced, Other, Dirty Water, Fresh Water, Mud, Pipeline, Scavenger
Well Number	yes	yes	yes	exact match	many