ADOA – General Accounting Office

QUICK REFERENCE GUIDE:
GRID FEATURES

Grid Features

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Grid Features

Overview

This quick reference guide (QRG) instructs users how to use grid functionality and features in AZ360, the statewide financial management system. AZ360 contains a Standard Grid and an Advanced Grid.

- Standard Grid: Provides high level sorting, organizing and exporting of data.

- Advanced Grid: Provides enhanced data manipulation features providing users more control over the presentation and categorization of data.

Standard Grid Export Feature

The Standard Grid export feature is highlighted in this QRG. For more details regarding the Standard Grid, see the "Using Reference Tables and Inquiry Page" section of the AZ360 Manual – Foundations available at https://gao.az.gov/resources/training/gao-training-resources.

While this example details how to export data from the Accounting Journal (JACTG), all grids in AZ360 contain this feature.

1. Navigate to the JACTG page in AZ360.

2. Input search filters in order to narrow down the search results and click **Apply**.

Note: Users are encouraged to use as many filters as possible in order to limit search results, thereby, minimizing the number of records exported to Excel. Currently the system download limit is set to 100,000 records. When reached, the system will stop downloading any additional records.

3. The results will generate in the grid at the bottom of the screen.

4. Click **Grid Actions** and select one of the following options:

a. **Export** – Exports all checked records in the grid.

b. **Export All** – Exports all records in the reference table.

c. **Print** – Print the highlighted record.

Grid Actions ∨		
📤 Export	›	
📄 Export All	›	Viewable Columns
🖨 Print		Spreadsheet
		Available Columns
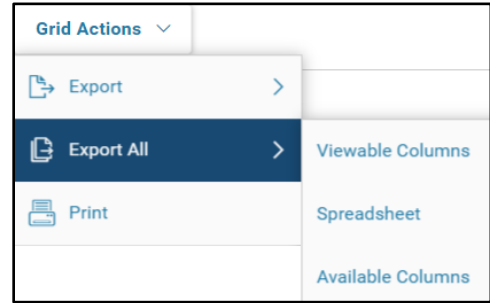
5. The Excel spreadsheet will then export with a file of the selected data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Run Date	Transaction Record Date	Accounting Period	Fiscal Year	Budget FY	Posting Code	Fund	Object	Revenue	BSA	Department	Unit
2	7/17/2023 12:09	7/17/2023	1	2024	2024	R003	1000		4632		ADA	N900
3	7/17/2023 12:09	7/17/2023	1	2024	2024	A001	1000		4632	70	ADA	N900
4	7/26/2023 13:16	7/26/2023	1	2024	2024	D014	1000	6185			ADA	5101
5	7/26/2023 13:16	7/26/2023	1	2024	2024	D014	1000	6041			ADA	5101
6	7/28/2023 17:18	7/28/2023	1	2024	2024	P005	1000	7531			ADA	5101

Navigate to Advanced Grid

1. Navigate to the desired AZ360 page.

2. Perform a query of the table that generates the results in the Standard Grid at the bottom of the page.

3. When the Standard Grid is displayed, select the Advanced Grid icon, in the upper right corner of the grid.
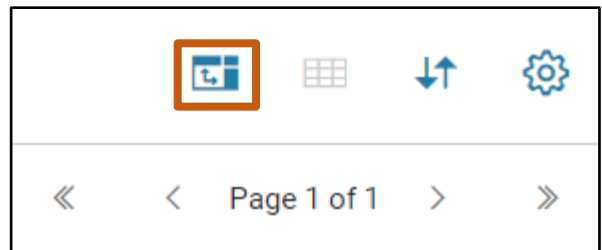
4. Once selected, the grid format will change, separating each column in the header. A sidebar menu labeled Columns and Filters also appears on the right side of the gird in collapsed view.

a. Before:

b. After:

Advanced Grid Features

## Column Grouping, Pinning and Resizing

To perform advanced grid features, hover the cursor over the desired column to group by, then select the three bar menu and select one of the following features:

- **Grouping**: Bundles records based on column values. To group by a column, hover over the desired column, select the three-bar menu, and then select the Group By [column name].
- **Pinning**: Pins a column to the left or right side of the grid.
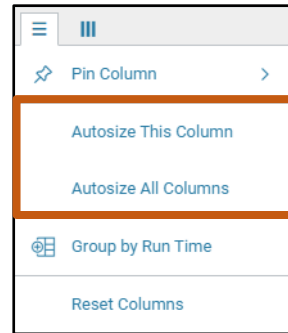- **Resizing**: Changes the width of a column based on the data.
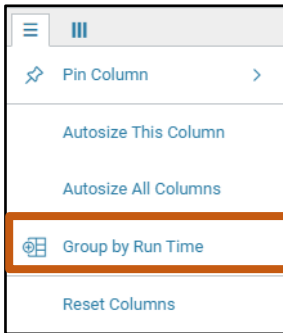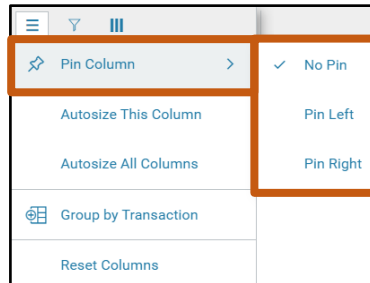
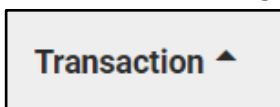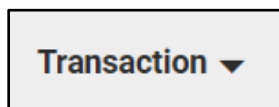| <u>Grouping</u>	<u>Pinning</u>	<u>Resizing</u>

Column Sorting

Columns can be sorted individually in either ascending or descending order. To sort a column, hover over the column and click the header. Each additional click will cycle through the sort options: ascending (first click), descending (second click), and reset (third click). The sort direction is indicated by the arrow next to the column header.
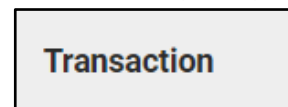
| First-click (Ascending)	Second-click (Descending)	Third-click (Reset)

Note: To sort all returned rows from the table it is recommended to first perform sorting on the Standard Grid before switching to the Advanced Grid mode.

Column Rearranging

To rearrange columns, hover over the desired column, click and hold the column header, then move it left or right to the desired position.
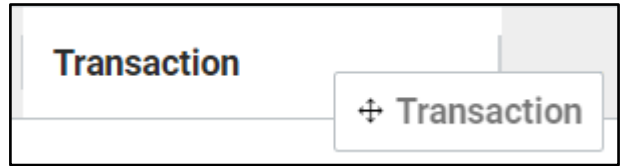
Filters

To filter data, select the Filters tab to see a list of columns available for filtering. Choose the desired column and input a filter value in the text box. Up to two filter values per column can be used with 'AND' or 'OR' operators.
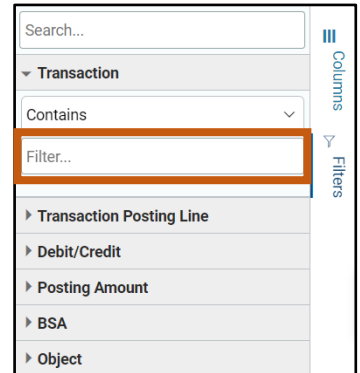
Columns – Matrix Table

The Columns tab allows users to remove columns from the grid and create a matrix table. Uncheck a column to remove it from the grid. To create a matrix table, select and place columns in the "Row Group" and "Value" wells.
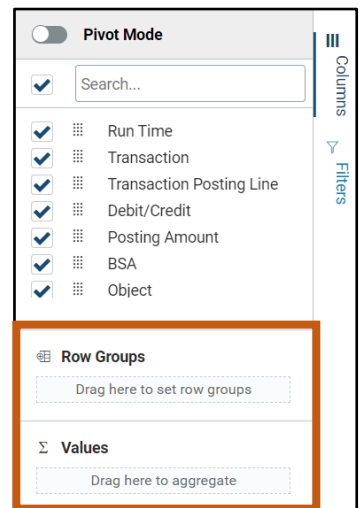
Columns – Pivot Table

To create a pivot table, activate pivot mode. Then select and place columns in the "Row Group", "Values" or "Column Labels" wells to construct the pivot table as desired.