Maker View – User Manual

1. Dashboard Overview

1.1 Navigation

- Access the Maker Dashboard from the main navigation menu.
- The view is divided into two sections:
  - **Grouped Tables**
  - **Ungrouped Tables**

1.2 Table Selection

- Choose between *Grouped* or *Ungrouped* tables:
  - **Grouped Tables**:
    - Select a group from the dropdown.
    - Then select a table within that group.
  - **Ungrouped Tables**:
    - Directly select from the list of available tables.

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2. Table View & Data Management

2.1 Table Interface

- **Layout Includes**:
  - Edit icon column (leftmost)
  - Data columns based on permissions
  - Pagination controls
  - Search and filter options
  - "Add Row" button at bottom-right

2.2 Data Viewing

- **Column Display**:
  - Editable: White background
  - Non-editable: Light gray
  - Highlighted cells = Pending changes
- **Navigation**:
  - Use pagination for navigating pages
  - Adjust rows per page

- o Click column headers to sort

- o Use search to filter data

2.3 Filtering & Sorting

- **Search**:

  - o Filters records across all searchable columns

- **Sorting**:

  - o Click headers to sort (ascending/descending)

  - o Multi-column sort supported

  - o Sort indicators show direction

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3. Editing Data

3.1 Edit Existing Records

- Click the edit (pencil) icon on a row

- Opens **Edit Drawer** with:

  - o Editable fields (white)

  - o Non-editable fields (gray)

  - o Dropdowns if configured

  - o Validation rules

3.2 Making Changes

- **Field Types**:

  - o Text: Enter directly

  - o Dropdown: Choose from list

  - o Date: Use date picker

  - o Numeric: Enter numbers with validations

- **Validation**:

  - o Required fields marked with *

  - o Errors shown on invalid inputs

  - o Formatting guidelines displayed

- **Dependent Dropdowns**:

  - o Select parent value first

  - o Child dropdown updates accordingly

o   Clear dependency cues provided

3.3 Adding New Records

- Click the "+" button (bottom-right)

- Fill out the form:

    o   Required fields must be filled

    o   Optional fields can be left blank

    o   Validation rules apply

3.4 Saving Changes

- Review changes

- Click **Save**

- System actions:

    o   Validates inputs

    o   Displays errors if any

    o   Creates a change request

    o   Notifies the checker

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4. Change Tracking

4.1 Change Indicators

- Highlighted modified cells

- Visual and status indicators for pending changes

4.2 Change History

- View pending changes

- Track approval status

- Read checker comments on rejections

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5. Special Features

5.1 Bulk Operations

- **CSV Upload**:

    o   Click upload button

    o   Select file

    o   Map columns if needed

- o Validate before submitting

  - o Review errors (if any)

- **CSV Download**:

  - o Export current view

  - o Choose columns and format

5.2 Data Validation

- **Input Validation**:

  - o Real-time checks

  - o Show format expectations

  - o Errors for invalid data

- **Business Rules**:

  - o Validations based on dependent fields

  - o Cross-field checks

  - o Custom rule support

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6. Notifications

6.1 System Notifications

- Change submissions

- Approvals or rejections

- Validation errors

- System-wide messages

6.2 Status Updates

- Track pending, approved, and rejected changes

- View comments on rejections

- Stay updated with status messages