

eTurns

# Categories

[Help documentation](#)

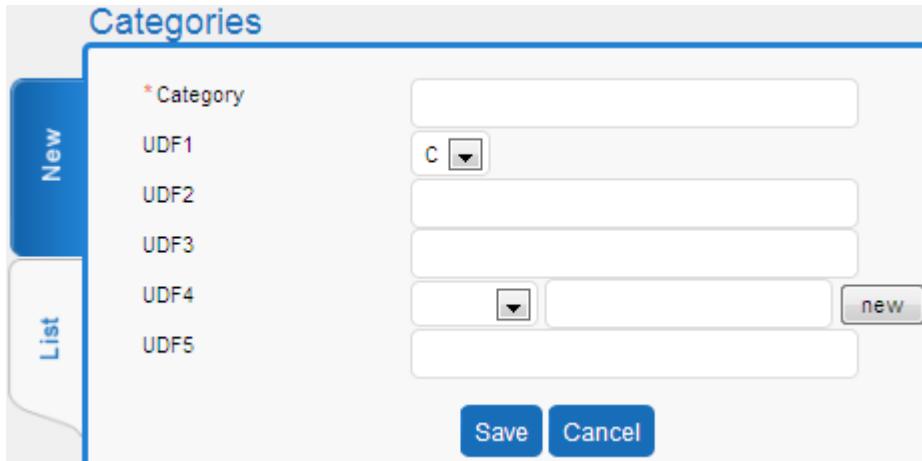
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## 1. Editing features

### a. New

It enables the user to create a new field, depending on the authority level. The user can either click on vertical tab "New" on the screen or right click and select 'New' from the list. The following screen is displayed:

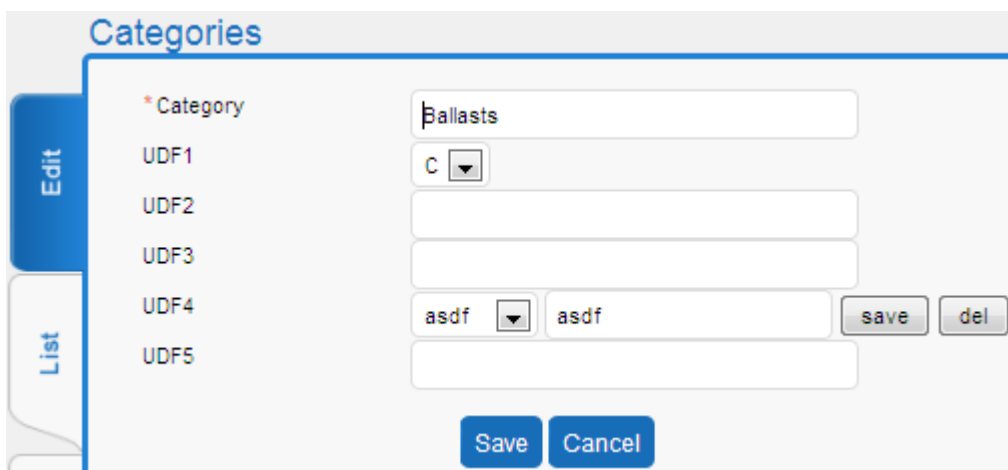


The screenshot shows the 'Categories' form with the 'New' tab selected. The form includes a list of fields on the left: '\* Category', 'UDF1', 'UDF2', 'UDF3', 'UDF4', and 'UDF5'. The corresponding input fields on the right are: a text box for '\* Category', a dropdown menu for 'UDF1' showing 'C', empty text boxes for 'UDF2' and 'UDF3', a dropdown menu for 'UDF4' showing a downward arrow, and an empty text box for 'UDF5'. A 'new' button is located next to the 'UDF4' input field. At the bottom, there are 'Save' and 'Cancel' buttons.

User can save records hitting "Enter" key of the key board or clicking "Save" button. Clicking "Cancel" button will redirect user to "History" tab.

### b. Edit

It enables the user to edit an existing field, depending on the authority level. Select the field to be edited and click on it. The following screen is displayed:



The screenshot shows the 'Categories' form with the 'Edit' tab selected. The form includes a list of fields on the left: '\* Category', 'UDF1', 'UDF2', 'UDF3', 'UDF4', and 'UDF5'. The corresponding input fields on the right are: a text box for '\* Category' containing 'Ballasts', a dropdown menu for 'UDF1' showing 'C', empty text boxes for 'UDF2' and 'UDF3', a dropdown menu for 'UDF4' showing 'asdf', and a text box for 'UDF5' containing 'asdf'. 'save' and 'del' buttons are located next to the 'UDF4' and 'UDF5' input fields respectively. At the bottom, there are 'Save' and 'Cancel' buttons.

User can save records hitting "Enter" key of the key board or clicking "Save" button. Clicking "Cancel" button will redirect user to "History" tab.

**Note:** The fields marked star are compulsory to enter.

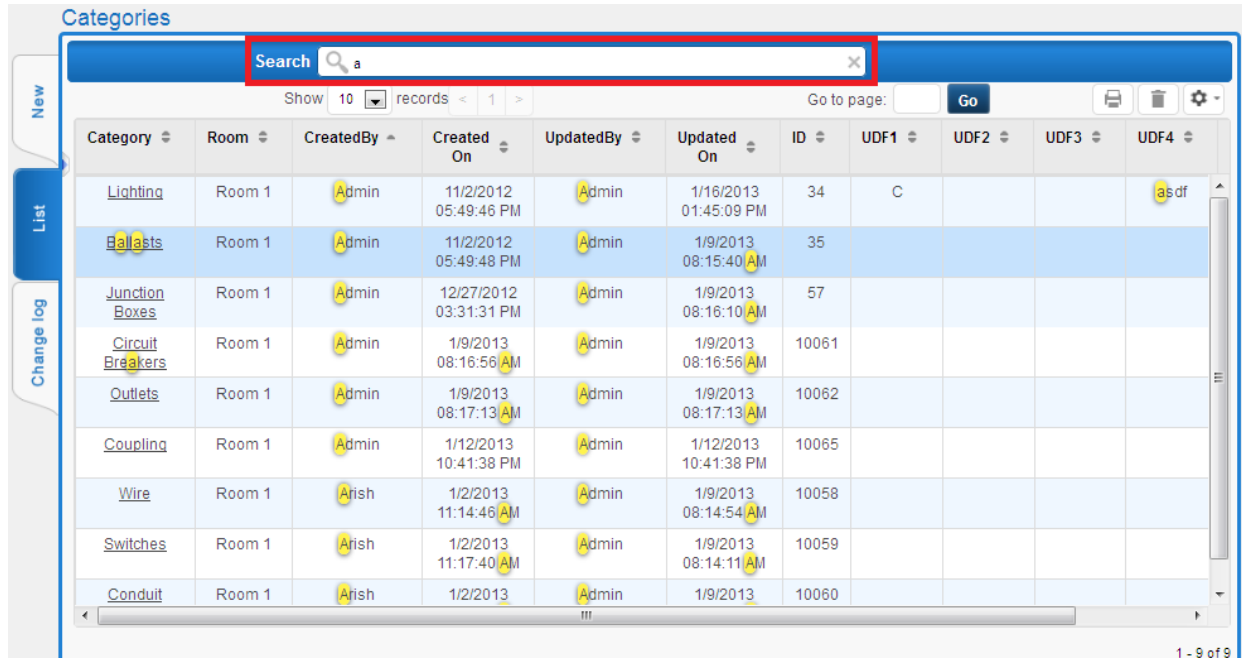


## 2. General features

### a. Search functionality

#### i. Main search

It enables user to search the specific page for any keyword. Enter the keyword in the Search dialog box. Searched field is highlighted and displayed in the list.



Categories

Search

Show 10 records < 1 > Go to page:  Go

| Category         | Room   | CreatedBy | Created On             | UpdatedBy | Updated On            | ID    | UDF1 | UDF2 | UDF3 | UDF4 |
|------------------|--------|-----------|------------------------|-----------|-----------------------|-------|------|------|------|------|
| Lighting         | Room 1 | Admin     | 11/2/2012 05:49:46 PM  | Admin     | 1/16/2013 01:45:09 PM | 34    | C    |      |      | asdf |
| Ballasts         | Room 1 | Admin     | 11/2/2012 05:49:48 PM  | Admin     | 1/9/2013 08:15:40 AM  | 35    |      |      |      |      |
| Junction Boxes   | Room 1 | Admin     | 12/27/2012 03:31:31 PM | Admin     | 1/9/2013 08:16:10 AM  | 57    |      |      |      |      |
| Circuit Breakers | Room 1 | Admin     | 1/9/2013 08:16:56 AM   | Admin     | 1/9/2013 08:16:56 AM  | 10061 |      |      |      |      |
| Outlets          | Room 1 | Admin     | 1/9/2013 08:17:13 AM   | Admin     | 1/9/2013 08:17:13 AM  | 10062 |      |      |      |      |
| Coupling         | Room 1 | Admin     | 1/12/2013 10:41:38 PM  | Admin     | 1/12/2013 10:41:38 PM | 10065 |      |      |      |      |
| Wire             | Room 1 | Arish     | 1/2/2013 11:14:46 AM   | Admin     | 1/9/2013 08:14:54 AM  | 10058 |      |      |      |      |
| Switches         | Room 1 | Arish     | 1/2/2013 11:17:40 AM   | Admin     | 1/9/2013 08:14:11 AM  | 10059 |      |      |      |      |
| Conduit          | Room 1 | Arish     | 1/2/2013               | Admin     | 1/9/2013              | 10060 |      |      |      |      |

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**Note:** Search functionality searches the keywords as you type. The fields with similar keywords get highlighted.

#### ii. Narrow Search By functionality

As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
- The following screen appears:

Categories

Search

Show 10 records < 1 > Go to page:  Go

**Narrow Search By:**

User Created by

User Updated by

Date Created

From  To

Date Updated

From  To

UDF1

UDF4

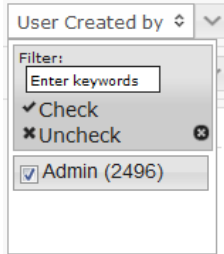
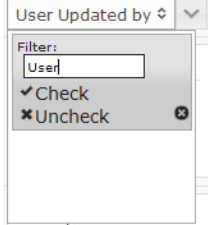

Clear

| Category         | Room   | CreatedBy | Created On             | UpdatedBy | Updated On            | ID    | UDF1 | UDF2 |
|------------------|--------|-----------|------------------------|-----------|-----------------------|-------|------|------|
| Lighting         | Room 1 | Admin     | 11/2/2012 05:49:46 PM  | Admin     | 1/16/2013 01:45:09 PM | 34    | C    |      |
| Ballasts         | Room 1 | Admin     | 11/2/2012 05:49:48 PM  | Admin     | 1/9/2013 08:15:40 AM  | 35    |      |      |
| Junction Boxes   | Room 1 | Admin     | 12/27/2012 03:31:31 PM | Admin     | 1/9/2013 08:16:10 AM  | 57    |      |      |
| Circuit Breakers | Room 1 | Admin     | 1/9/2013 08:16:56 AM   | Admin     | 1/9/2013 08:16:56 AM  | 10061 |      |      |
| Outlets          | Room 1 | Admin     | 1/9/2013 08:17:13 AM   | Admin     | 1/9/2013 08:17:13 AM  | 10062 |      |      |
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| Wire             | Room 1 | Arish     | 1/2/2013 11:14:46 AM   | Admin     | 1/9/2013 08:14:54 AM  | 10058 |      |      |
| Switches         | Room 1 | Arish     | 1/2/2013 11:17:40 AM   | Admin     | 1/9/2013 08:14:11 AM  | 10059 |      |      |
| Conduit          | Room 1 | Arish     | 1/2/2013               | Admin     | 1/9/2013              | 10060 |      |      |

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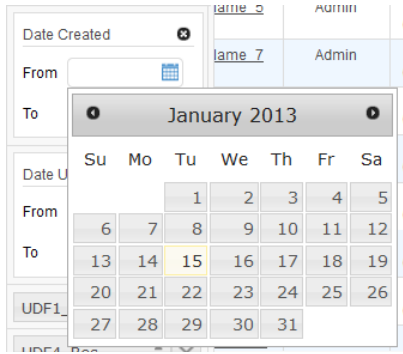
**Note:**

- At point of time only one of the either searches will work.
- Fields in narrow search may vary from module to module.

| Field           | Description  |
|-----------------|--|
| User Created by | <p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>  |
| User Updated by | <p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made.</p> <p><b>Note:</b> To cancel the selections made at any point of time, click .</p> |

Date Created and Date Updated

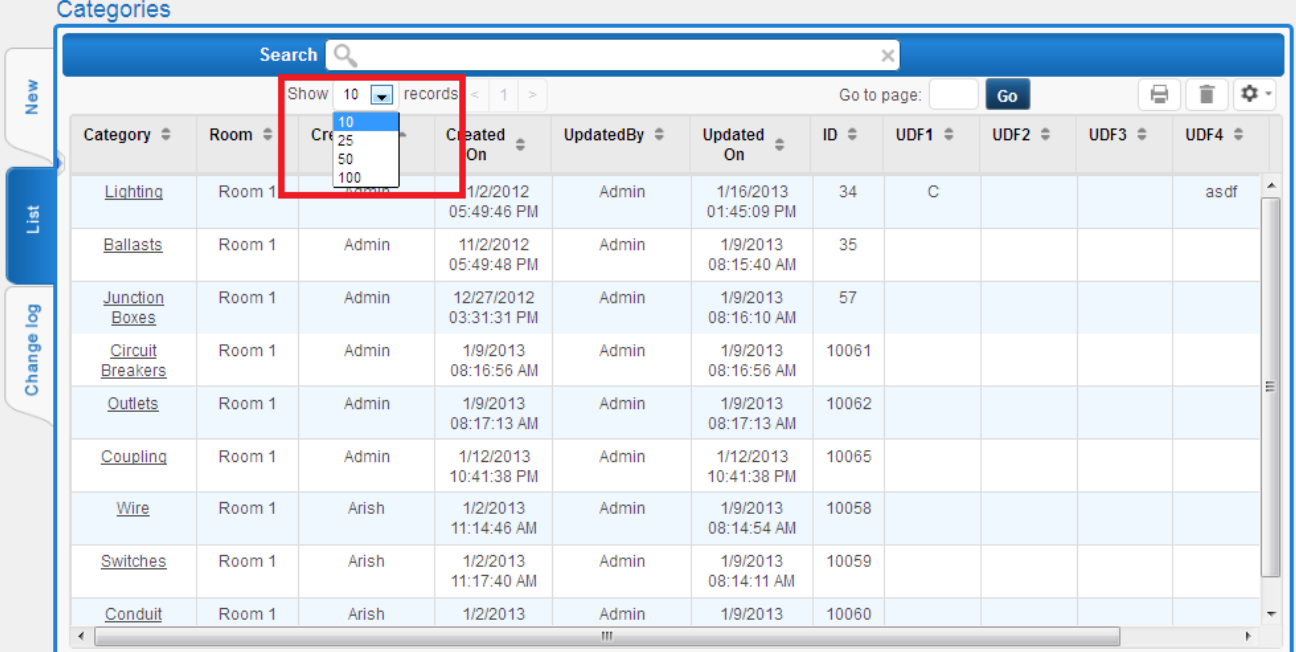
They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.



Note: To clear the entire selection, click Clear

### b. Show records Functionality

Show records functionality is dropdown option that enables user to view specified number of fields per page.



The screenshot shows a table with the following columns: Category, Room, Created On, Updated By, Updated On, ID, UDF1, UDF2, UDF3, UDF4. The 'Show 10 records' dropdown is highlighted with a red box. The 'Go to page' box contains the number '1' and the 'Go' button is next to it. The table contains 9 rows of data.

**Note:** Show records functionality enables user to select from 10, 25, 50 and 100 fields to be displayed per page.

### c. Go To Page Functionality

Go To Page functionality enables user to skip any specified page. Type the specified page number to view in the Go to page box and then click Go. The specified page is displayed on the screen.

Categories

Search

Show 10 records < 1 > Go to page: 1 Go

| Category                         | Room   | CreatedBy | Created On             | UpdatedBy | Updated On            | ID    | UDF1 | UDF2 | UDF3 | UDF4 |
|----------------------------------|--------|-----------|------------------------|-----------|-----------------------|-------|------|------|------|------|
| <a href="#">Lighting</a>         | Room 1 | Admin     | 11/2/2012 05:49:46 PM  | Admin     | 1/16/2013 01:45:09 PM | 34    | C    |      |      | asdf |
| <a href="#">Ballasts</a>         | Room 1 | Admin     | 11/2/2012 05:49:48 PM  | Admin     | 1/9/2013 08:15:40 AM  | 35    |      |      |      |      |
| <a href="#">Junction Boxes</a>   | Room 1 | Admin     | 12/27/2012 03:31:31 PM | Admin     | 1/9/2013 08:16:10 AM  | 57    |      |      |      |      |
| <a href="#">Circuit Breakers</a> | Room 1 | Admin     | 1/9/2013 08:16:56 AM   | Admin     | 1/9/2013 08:16:56 AM  | 10061 |      |      |      |      |
| <a href="#">Outlets</a>          | Room 1 | Admin     | 1/9/2013 08:17:13 AM   | Admin     | 1/9/2013 08:17:13 AM  | 10062 |      |      |      |      |
| <a href="#">Coupling</a>         | Room 1 | Admin     | 1/12/2013 10:41:38 PM  | Admin     | 1/12/2013 10:41:38 PM | 10065 |      |      |      |      |
| <a href="#">Wire</a>             | Room 1 | Arish     | 1/2/2013 11:14:46 AM   | Admin     | 1/9/2013 08:14:54 AM  | 10058 |      |      |      |      |
| <a href="#">Switches</a>         | Room 1 | Arish     | 1/2/2013 11:17:40 AM   | Admin     | 1/9/2013 08:14:11 AM  | 10059 |      |      |      |      |
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#### d. Export Functionality

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.

Categories

Search

Show 10 records < 1 > Go to page: 1 Go

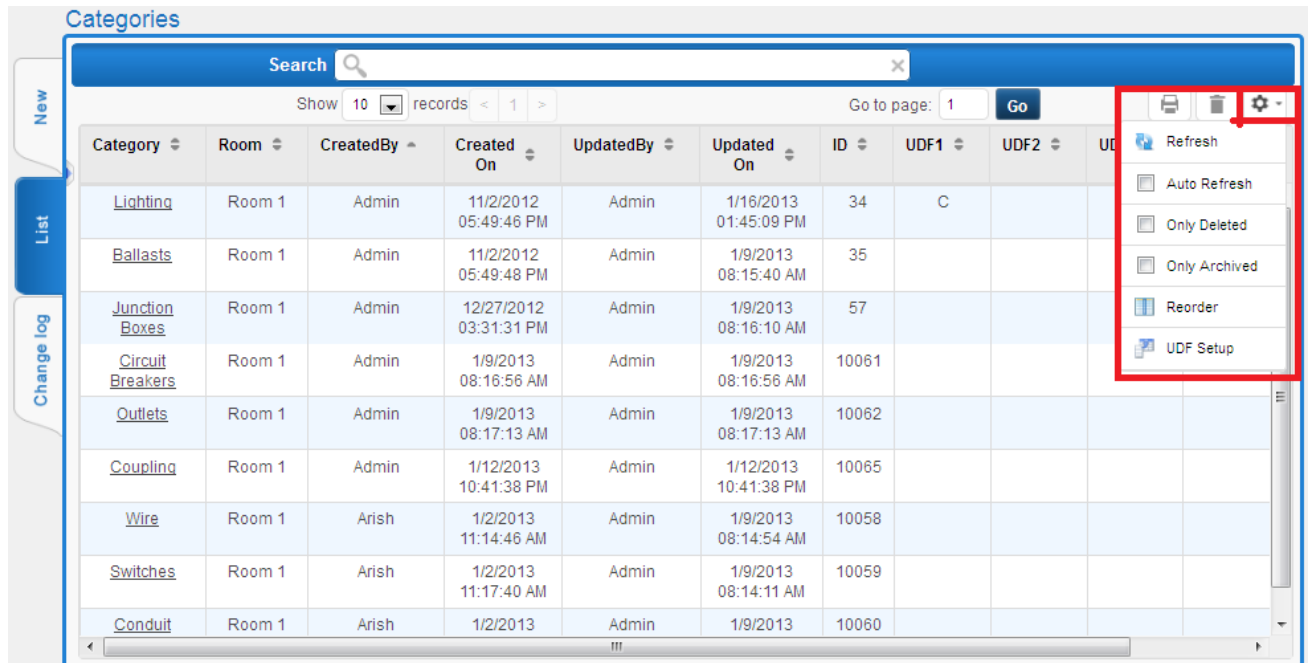
| Category                         | Room   | CreatedBy | Created On             | UpdatedBy | Updated On            | ID    | UDF1 | UDF2 | UDF3 |
|----------------------------------|--------|-----------|------------------------|-----------|-----------------------|-------|------|------|------|
| <a href="#">Lighting</a>         | Room 1 | Admin     | 11/2/2012 05:49:46 PM  | Admin     | 1/16/2013 01:45:09 PM | 34    | C    |      |      |
| <a href="#">Ballasts</a>         | Room 1 | Admin     | 11/2/2012 05:49:48 PM  | Admin     | 1/9/2013 08:15:40 AM  | 35    |      |      |      |
| <a href="#">Junction Boxes</a>   | Room 1 | Admin     | 12/27/2012 03:31:31 PM | Admin     | 1/9/2013 08:16:10 AM  | 57    |      |      |      |
| <a href="#">Circuit Breakers</a> | Room 1 | Admin     | 1/9/2013 08:16:56 AM   | Admin     | 1/9/2013 08:16:56 AM  | 10061 |      |      |      |
| <a href="#">Outlets</a>          | Room 1 | Admin     | 1/9/2013 08:17:13 AM   | Admin     | 1/9/2013 08:17:13 AM  | 10062 |      |      |      |
| <a href="#">Coupling</a>         | Room 1 | Admin     | 1/12/2013 10:41:38 PM  | Admin     | 1/12/2013 10:41:38 PM | 10065 |      |      |      |
| <a href="#">Wire</a>             | Room 1 | Arish     | 1/2/2013 11:14:46 AM   | Admin     | 1/9/2013 08:14:54 AM  | 10058 |      |      |      |
| <a href="#">Switches</a>         | Room 1 | Arish     | 1/2/2013 11:17:40 AM   | Admin     | 1/9/2013 08:14:11 AM  | 10059 |      |      |      |
| <a href="#">Conduit</a>          | Room 1 | Arish     | 1/2/2013               | Admin     | 1/9/2013              | 10060 |      |      |      |

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### e. Settings functionality

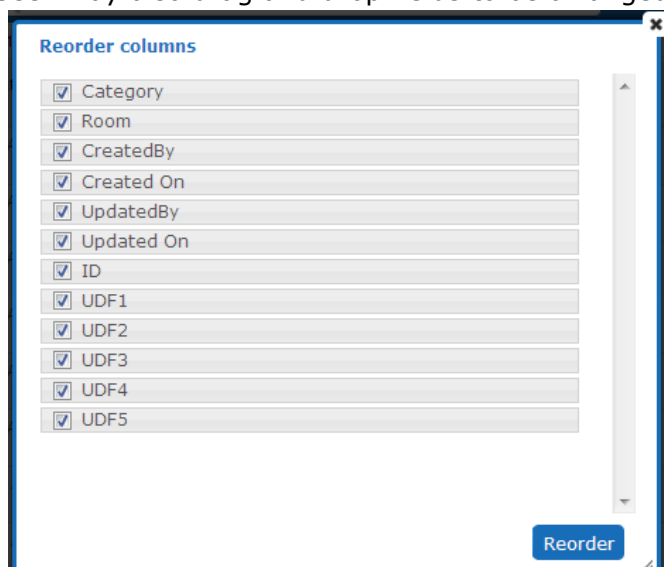
Settings functionality enables user to perform various actions on the module.



The screenshot shows the 'Categories' module interface. It includes a search bar, a table with columns for Category, Room, CreatedBy, Created On, UpdatedBy, Updated On, ID, UDF1, UDF2, and UDF3. A settings menu is open on the right, highlighting options: Refresh, Auto Refresh, Only Deleted, Only Archived, Reorder, and UDF Setup.

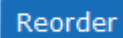
| Category                         | Room   | CreatedBy | Created On             | UpdatedBy | Updated On            | ID    | UDF1 | UDF2 | UDF3 |
|----------------------------------|--------|-----------|------------------------|-----------|-----------------------|-------|------|------|------|
| <a href="#">Lighting</a>         | Room 1 | Admin     | 11/2/2012 05:49:46 PM  | Admin     | 1/16/2013 01:45:09 PM | 34    | C    |      |      |
| <a href="#">Ballasts</a>         | Room 1 | Admin     | 11/2/2012 05:49:48 PM  | Admin     | 1/9/2013 08:15:40 AM  | 35    |      |      |      |
| <a href="#">Junction Boxes</a>   | Room 1 | Admin     | 12/27/2012 03:31:31 PM | Admin     | 1/9/2013 08:16:10 AM  | 57    |      |      |      |
| <a href="#">Circuit Breakers</a> | Room 1 | Admin     | 1/9/2013 08:16:56 AM   | Admin     | 1/9/2013 08:16:56 AM  | 10061 |      |      |      |
| <a href="#">Outlets</a>          | Room 1 | Admin     | 1/9/2013 08:17:13 AM   | Admin     | 1/9/2013 08:17:13 AM  | 10062 |      |      |      |
| <a href="#">Coupling</a>         | Room 1 | Admin     | 1/12/2013 10:41:38 PM  | Admin     | 1/12/2013 10:41:38 PM | 10065 |      |      |      |
| <a href="#">Wire</a>             | Room 1 | Arish     | 1/2/2013 11:14:46 AM   | Admin     | 1/9/2013 08:14:54 AM  | 10058 |      |      |      |
| <a href="#">Switches</a>         | Room 1 | Arish     | 1/2/2013 11:17:40 AM   | Admin     | 1/9/2013 08:14:11 AM  | 10059 |      |      |      |
| <a href="#">Conduit</a>          | Room 1 | Arish     | 1/2/2013               | Admin     | 1/9/2013              | 10060 |      |      |      |

- Refresh: This option refreshes the module and displays the latest changes implemented.
- Auto Refresh: This option automatically refreshes the screen in specified time.
- Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- Reorder: This option enables user to reorder the columns of the module.
  - User can also select which field to appear on screen and which remains to be hidden.
  - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
  - User may also drag and drop fields to be arranged in order of choice.



The 'Reorder columns' dialog box shows a list of fields with checkboxes next to them, indicating which fields are visible. The fields are: Category, Room, CreatedBy, Created On, UpdatedBy, Updated On, ID, UDF1, UDF2, UDF3, UDF4, and UDF5. All checkboxes are checked. A 'Reorder' button is at the bottom right.

- After the selection is completed, click



**Note:** To cancel the selection, click



### 3. Miscellaneous

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing
- 5) Multi selection of rows by clicking each row