

# Work with Grids (Tables) in Jackrabbit

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Throughout Jackrabbit you will see grids, which are sometimes referred to as tables. These grids display the data you have entered into Jackrabbit; they are incredibly robust - allowing you to group, sort, filter for specific information, and more. *Note: the features available in each grid throughout Jackrabbit may vary.*

## Sample Grid

The screenshot shows the 'Staff Certifications' grid. At the top right is a 'MANAGE CERTIFICATIONS' button (7). Below the title bar is a breadcrumb bar (1) showing 'ALL STAFF CERTIFICATIONS' and filters: 'Type: REQUIRED', 'Names: 3 Items', and 'Names: CPR, First Aid, CPR - Infant/Child'. Below this, it says 'Showing 7 of 16 Staff Certifications' with a 'HELP WITH GRIDS' link. A 'RETURN' button is on the left. An 'Export to Excel' button is above the grid. The grid has columns: NAME, TYPE, FIRST NAME, LAST NAME, EMAIL, STAFF STATUS, CERT STATUS, and CERTIF. The 'NAME' column is grouped (2). The 'TYPE' column has a filter applied (5), and its menu is highlighted in blue (6). The first row of the 'CPR' group is selected, and its row menu is open (3), showing options like 'Sort Ascending', 'Sort Descending', 'Columns', 'Filter', 'Lock', and 'Unlock'. The page number '1' is displayed (4), and the 'items per page' dropdown is set to '50'. A pagination bar at the bottom right shows a slider (9).

	NAME	TYPE	FIRST NAME	LAST NAME	EMAIL	STAFF STATUS	CERT STATUS	CERTIF
Name: CPR								
<input type="checkbox"/>	CPR	REQUIRED	Stephanie	Andrews	ws@gmail.com	Active	OVERDUE	Nov 1, 2
<input type="checkbox"/>	CPR	REQUIRED	Dianne	Harris	gmail.com	Active	EXPIRED	Aug 15,
<input type="checkbox"/>	CPR	REQUIRED	Dianne	Harris	dilinh@gmail.com	Active	CURRENT	Dec 4, 2
<input type="checkbox"/>	CPR	REQUIRED	John	Linton	jlintonjr@outlook.com	Active	OVERDUE	Dec 2, 2
Name: First Aid								
<input type="checkbox"/>	First Aid	REQUIRED	Stephanie	Andrews	standrews@gmail.com	Active	INCOMPLETE	

- 1 - The breadcrumb bar displays the currently selected filters.
- 2 - Drag and drop a column header into the grouping bar to group results.
- 3 - Click a row menu to open action options for that row.
- 4 - Page number displays up to 250 items per page.
- 5 - When a column filter is applied, the column menu is highlighted in blue.

- 6 - The column menu offers options to sort, display, and filter the data within the column (options in this menu vary depending on the grid).
- 7 - Manage Certifications opens the Drop-down List Editor to edit (for the Certifications page only).
- 8 - Send Message and Add New icons ( the action icons available will vary between grids).
- 9 - Slider shows more columns in the grid.

Expand each section below to learn how to use the various grid features.

## Group Your Data

Drag and drop **column headers** to the **grouping bar** to create groups within your report.

- Click on the column title in the grouping bar to re-sort the column in ascending or descending order.
- When multiple columns are added to the grouping bar, the first column on the left is the first level of grouping. The second column added to the grouping bar will group the rows within the first column, etc.
- Click and drag the **column headers** left or right within the **grouping bar** to change the order.
- Use the **X** in the column header to clear a column from the **grouping bar**.

**Student Detail**

← RETURN

Showing 10 of 10 Students [HELP WITH THIS GRID](#)

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Drag a column header and drop it here to group by that column

	FIRST NAME	LAST NAME	CLASSES	AGE	BIRTH DATE	FAMILY NAME	CONTACT	EMAIL	HOME PHONE
<input type="checkbox"/>	Cindy	Dierksen	Artistic Gymnastics L3 - Thurs 7pm(85)	17 yrs	Jun 10, 2002	Dierksen	Marlene Dierksen	jintonjr@outlook.com	(704) 555-4446
<input type="checkbox"/>	Dani	Ager	Ballet L1 - Mon 5pm(45), Hip Hop L2 - Thurs 7pm(67.50)	17 yrs	Jul 11, 2002	Ager	Holly Ager	hollyager41@gmail.com	(704) 374-2415
<input type="checkbox"/>	Dave	Ager	Hip Hop L2 - Thurs 7pm(67.50)	17 yrs	Jul 11, 2002	Ager	Holly Ager	hollyager41@gmail.com	(704) 374-2415
<input type="checkbox"/>	Shawna	Evans	Tap L1 - Mon 6pm(45)	17 yrs	Jul 30, 2002	Evans	Taylor Evans	tayevans@email.com	(704) 555-5478

## Sort and Filter Data in the Grid

There are multiple ways you can sort and filter data in a grid. Select the options that work best for you:

You can reorder the columns in a grid by clicking and dragging them to the spots you want them in. Double arrowheads indicate where the column will drop (behind the arrowheads).

First Name	Last	+ Contact	Contact
Allen	King		Bella King

Click on the *column header* to sort in ascending or descending order. An arrow displays to show the current sorting order; no arrow indicates that no sorting has been done on the column.

Showing 27 of 27 Families [HELP WITH THIS GRID](#)

[Print](#) [Export to Excel](#)

Drag a column header and drop it here to group by that column

	FAMILY	BALANCE	STATUS
	Ager	276.90	Active
	Brown	150.00	Inactive

Use the *column menu* to access the sorting options for each column.

- Ascending order
- Descending order

Showing 27 of 27 Families [HELP WITH THIS GRID](#)

[Print](#) [Export to Excel](#)

Drag a column header and drop it here to group by that column

	FAMILY	BALANCE	STATUS
	Ingleton		
	Brown		
	Dierksen		

Multi-sort columns in the grid, for example:

- Click the **Family** column header to sort the column in ascending order A-Z (as on the right). An up arrow and the number 1 indicates this is the 1st column in the sort.
- Next, click the **Status** column header and all the active families will be listed first in the grid. An up arrow and the number 2 indicates this is the 2nd column in the sort.
- The column width expands to show the sorting information.

FAMILY	BALANCE	STATUS
Ager	40.00	Active
Bowden	0.00	Active
Brown	50.00	Active
Campbell	0.00	Active
Clements	126.25	Inactive

- Click **Columns** in the column menu to select the columns you would like to view in your grid.

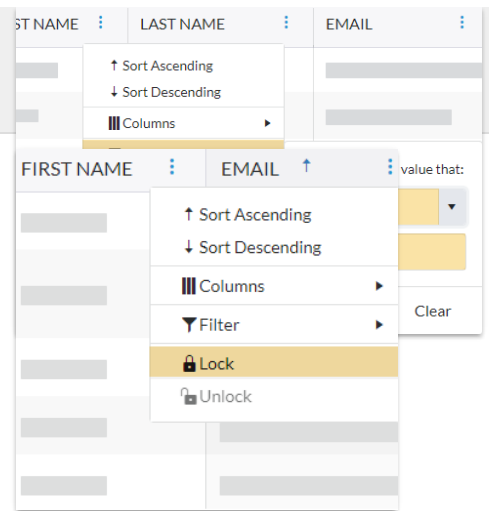
FIRST NAME	LAST NAME	EMAIL
		standrews@gma

- In the column menu, use **Filter** to drill-down further into your column data (available in most grids).
- More than one column can be filtered at a time.
- There are several types of column filters. Some filtering will list all values in the column with check boxes and a search field while other filters allow you to define the filter with options such as "Is equal to" or "Contains".
- Applied filters display in the *breadcrumb bar*.

- The column menu for a filtered column is highlighted in blue.

- From the column menu, you can lock a column so that when you scroll horizontally, the column will always remain in the display while the remainder of the columns scroll.

Use the *horizontal scroll bar* (lower right when visible) to move the grid from left to right.

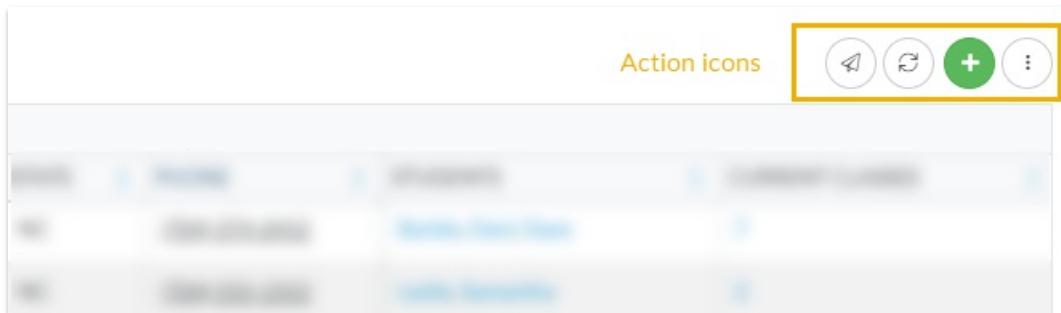


Many grids offer column searching, which allows you to find information within a column quickly. For example, on the All Students page, you can enter a student's name in the search field of the Student column. The grid will then display only the rows that contain that name in the Student column.

## Take Action

Each grid is designed to provide ease of use and to simplify different actions you may want to take. Work with an individual record (e.g., a specific family), or apply an action to several records at once (mass action).





## Action Icons



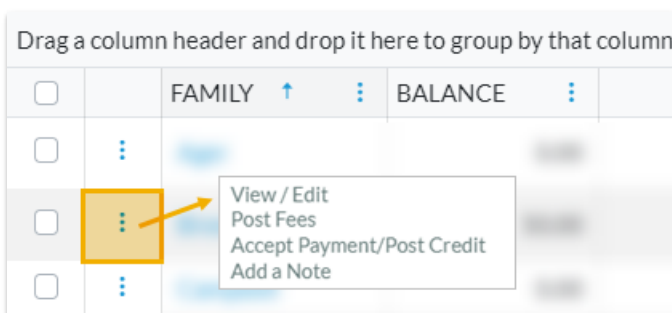
Located on the right hand side of the grid, the action icons available will vary between grids.


**Send a Message** - Choose to send an [email](#), [push notification](#), or [text message](#) to chosen recipients in the selected records, e.g., Primary Contacts only, or Primary, Billing, and Other Contacts.

- Select the check box for the records (e.g., families or students) you want

	<p>included in the message. You can select individual records across multiple pages.</p> <ul style="list-style-type: none"> <li>• To send to all records currently displayed on a page (max 250/page) select the check box in the column header.</li> <li>• To send to ALL records on ALL pages, leave all check boxes empty. All records will be included.</li> </ul>
	<p>Use the <b>Refresh Grid</b> (icon) to reload the data in the grid after making a change.</p>
	<p>Click the <b>Add New</b> icon to open a pop-up window to add new data. This icon is visible depending on which grid you are viewing, for example, on the Staff Certifications page <i>Add New Certificate</i> window opens or on the All Families page an <i>Add New Family</i> window opens.</p> <p>If any rows are selected in the grid, an <i>Add New</i> icon will not be visible.</p>
	<p>Use the <b>More icon</b> to access actions that can be taken with one or more records at once. The options available will differ between grids, e.g., in All Families you can update Family Fixed Fees, Family Discounts, Clear UDF Answers, and more.</p> <ul style="list-style-type: none"> <li>• Select the check box for the rows you want included in mass action. You can select individual rows across multiple pages or select the check box in the column header to select all rows <b>currently displayed on the page</b> (max 250/page).</li> </ul>

## Row Actions



Click on the **Row Menu**  to access actions that can be taken with the record in that row. The row actions offered will vary between the different grids in Jackrabbit and may include:

- **View/Edit** - click on the link to open the content in the row and make changes.
- **Delete** - remove a row from that grid.
- **Add a Note** - add a note to the record.
- **Additional actions** - click on the row menu to see the other action options.

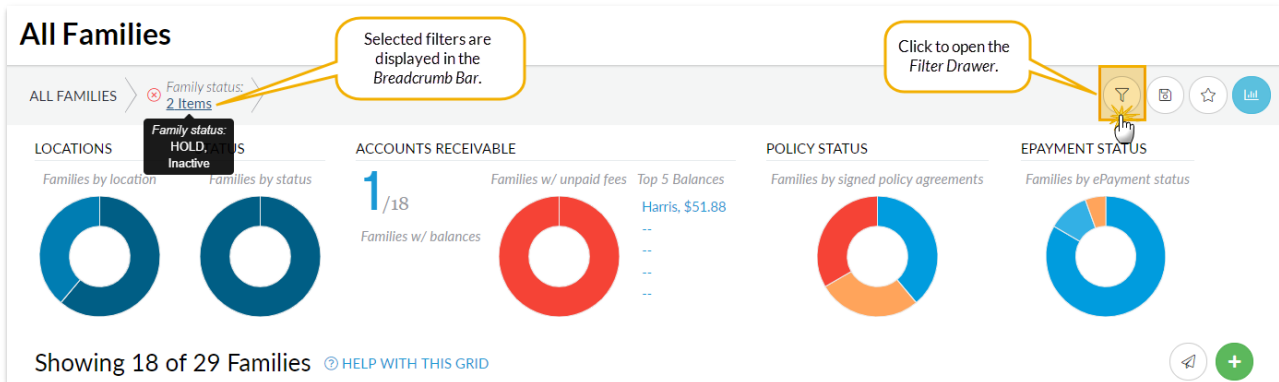






If any check boxes are selected in the first column of a grid, the row menus are deactivated and are no longer visible.

## Data Visuals

Some of the grids in Jackrabbit have visual elements, referred to as *data visuals*. Click on the sections of the visual to see the information populate in the grid results.



In addition, there is a filter drawer to make additional selections that narrow down results in the grid. Within the filter drawer, the criteria are organized into sections. Use the search field at the top of the drawer to locate a specific criteria and be taken directly to the matching filter. Use the *Expand All* link to open all sections or the arrow next to each section header to open individual sections. Click the **Apply** button to filter the data in your grid using the criteria you selected; these filters will display in the breadcrumb bar.

- Save your filtered data as a *Favorite*. Once filters are selected, click the *Save as favorite (icon)* , enter a favorite name, choose if you want to make the favorite a default view, and decide if you want to share with your team. Your filtered data, column width, column locked positions are all saved. Click *Save*.
- Load a *Favorite* by clicking on the *Favorites (icon)* , select your saved favorite from the drop-down list and click *Load*. The grid populates the data and the breadcrumbs indicate the selected filters.

Refer to [Work with All Families - View, Search, and Take Action](#) and [Work with All Students - View, Search, and Take Action](#) for more details on the All Families and All Students data visuals.