# SAMIS
## Provider: Program Group
## Working in the Grid



Anytime your screen looks like the one pictured below, you are in a grid section. Users have the ability to sort, filter, and edit fields in this section. There is also the option to control what fields appear in the grid. This allows users to monitor the completeness of data or update fields that may have changed after starting a new school year.



## Sort, Filter, and Edit Fields in the Grid

- **Sort** a field by clicking on the column title.

  - Example - if you click on column title "Last Name" the participants will be sorted in alphabetical order by their last name.

- **Filter** a field by right clicking on the cell containing the information you wish to filter. Scroll down to filter and select the option that works best.

  - Example - if you want to display only female participants , right click on a female cell, scroll down to filter, and select =female

  - When you are done with the filter select the garbage can on the top right of the grid.



- **Rearrange** the order of the columns in the grid by hovering your mouse arrow over the column title, click and hold the left mouse button, and move the mouse to the right or left.

- **Edit** cell information in the grid by clicking on  in the grid tool bar, make changes, and click on  again to toggle off edit. Only certain cells/fields can be edited in the grid.

  - Example - if a participant moved from elementary school to middle school, click on the edit mode and change cell information in the current school field.

  - If multiple students changed schools, sort the column and drag the black box in the bottom right corner of the cell down.
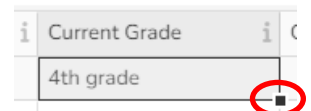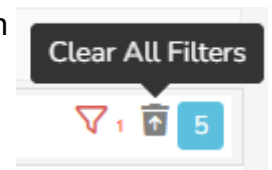
# Control What Fields Appear in the Grid

1. Select the gear icon on the tool bar
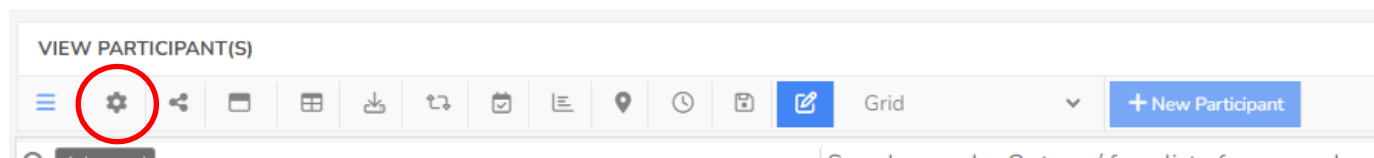


2. A popup will appear on the right side of the screen containing all fields that can be displayed in the grid.

3. Select the check box if you would like that field to appear in your grid. If you are done with that field uncheck the box.

4. You can search fields in "Type To Filter" area at the top of the popup.

5. Click "Update" at the bottom of popup and then click on "X" to close the field.