

## APPENDIX C: SORTING RECORDS, USING FILTERS & CHANGING THE PAGE SIZE

Most screens in ServTraq contain features that assist in customizing information displayed.

### Sort Information

Click on a Column Header to sort records by ascending or descending order. An arrow pointing up indicates the records have been sorted in ascending order. An arrow pointing down indicates the records have been sorted in descending order.

Customer Contacts					
Current View: All Contacts   View Customer/Contact   Delete Contact   Refr					
Drag a column header here to group by that column					
Customer	Contact Date	Contact Type	Contact Action	Call Code	Language
831 CUSTOMER	8/22/2012	INCOMING	EMERGENCY CALL FROM CUSTOMER	48 HR NOTICE REC'D	ENGLISH
ABBY CARRILLO	11/20/2012	INCOMING	EMERGENCY CALL FROM CUSTOMER	48 HR NOTICE REC'D	ENGLISH
ABEL GODINEZ	12/21/2012	INCOMING	STATUS - IN PERSON APP REQUEST	48 HR NOTICE REC'D	SPANISH

Column Headers can also be moved around to re-arrange the order of the fields displayed. Drag and Drop a column header to a different location. The column order returns to its default form once you leave the screen.

Customer Contacts				
Current View: Contacts Last 30 Days   View Customer/Contact   D				
Drag a column header here to group by that column				
Customer	Language	Contact Type	Contact Action	Call Code
JULIE GARCIA	ENGLISH	INCOMING	EMERGENCY CALL FROM CUSTOMER	RESOLVED
JIM MCNAMARRA	ENGLISH	OUTGOING	DEFICIENT APPLICATION PROCESS	NO ACTION REQ - RECORD ONLY

### Grouping Section Feature

The Grouping Section sorts by any field in the information screen. Drag and drop a Column Header into the section shown in red below.

The screenshot shows the 'Open Jobs List' interface. At the top, there is a search bar labeled 'Job ID' with a dropdown arrow. Below the search bar, there is a row of column headers: 'Job Type', 'Current Status', 'WSAG Signed Date', 'List Name', and 'Service Address'. The 'Job ID' search bar is highlighted with a red border.

Click on the arrows to the left of the grouped records to view information related to the sorted field.

The screenshot shows the 'Open Jobs List' interface with grouped records. The 'Job ID' column header is highlighted. Below the header, there is a list of job records. The first record is expanded, showing details for Job ID: 14093. The details include: LIEE REFRIGERATOR REPLACE, CLOSED - UNABLE TO COMPLETE, 3/29/2012, CHAPA, ROSEMARY, 2900 FAIRVIEW RD SPC 42, HOLLISTER, and 95023. Other job IDs listed are 20073, 22279, 22758, 23136, and 26965.

This feature also works with more than one field in the *Grouping Section*. The grouping will be in order from left to right, broad to narrow. This is shown below.

The screenshot shows the 'Open Jobs List' interface with grouped records. The 'Current Status' column header is highlighted. Below the header, there is a list of job records. The first record is expanded, showing details for 'Current Status: ASSESS IN PLACE JOB'. The details include: Job Type: WATER DEMAND REDUCTION, Job ID: 28375, WSAG Signed Date: 1/14/2011, List Name: MENDOZA, BLANCA DEANNA, Service Address: 570 TUTTLE AVE, City: WATSONVILLE, and Zip Code: 95076. Other job IDs listed are 29454, 4/16/2011, CHAMBERS, LLOYD, 413 LAKEVIEW RD, WATSONVILLE, and 95076.



Note: Sorting is still available on all fields, as well as filtering which is explained in the next section.

### Filters

#### Search Box

Use the search box to filter results by the text entered.

