
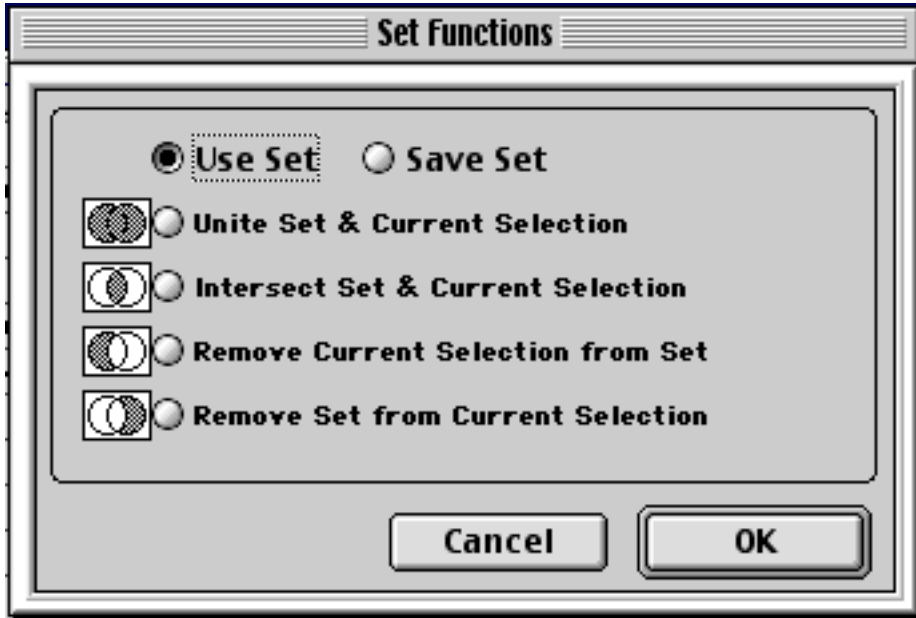


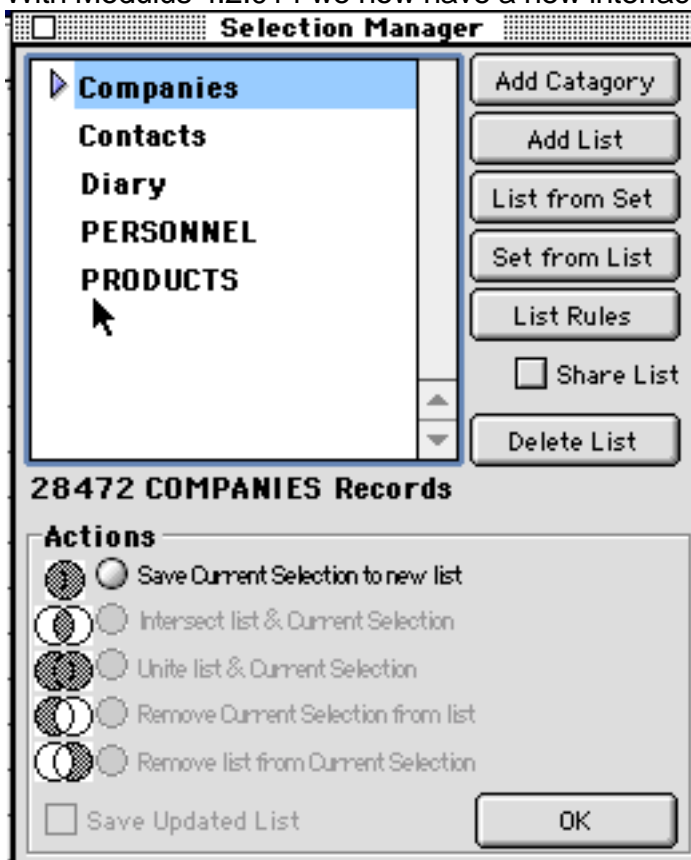
This short document describes the new features for Data selection management in MODULUS.



As you probably know if you are viewing a list of data in Modulus and click the  button on the button bar you get a dialog as follows.



With Modulus 4.2.014 we now have a new interface for this which looks like this:



So that you understand how to use this you should read this document carefully.

The first thing to note is that this is not a dialogue like the OLD set manager, that is it will not disappear as soon as you select something, it will remain on your screen, but you can close it by clicking the box in the top left had corner.

The second thing to note is that on all listing screens there is now a group of ICON's at the top of



the screen like so. This group of buttons allows you to manage your record selection in a way previously unkown in Modulus.

In any window which displays these icons Modulus will keep track of your previous selections for the time you have the window open. This allows you to work with a selection of records and search within the selection and then return to the main selection. This will keep track of up to 50 selections. The left hand button will display a pop-up allowing you to navigate to any of these selections. The left arrow button will allow you to move back one selection, and the right arrow will allow you to move to the next selection(if you reach the end of the selections this will move to selection no 1). There is no functionality to save the group of selections, this is a dynamic list allowing you to cache your work within a single window without having to re-do a search to find a selection of records. The middle button of the right hand 3(pack of cards) is a dragger button and will interact with the Data List Manager, use this to drag any selection of records to the Data List Manager, if you highlight a selection of records the highlighted selection will be passed to the Data List Manger.

The selection manager window features:-

### **The Catagories List.**

This contains a list of all the catagories in Modulus which you use. Within each catagory it contains the names of Data Lists which you have created for that catagory. When you first view the Data List Manager there may be only three catagories shown:-

Companies  
Contacts  
Diary

These are there by default. For all other areas of Modulus such as documents, ledgers, bookings, events etc. The catagory will add to the list of catagories when the selection manager is active and you view any list of records in that section of Modulus.

See BUTTONS for how to manually add Catagories to the selection manager.

## **The Actions**

The actions area of the Data List Manager provides similar functions to the old SET FUNCTIONS but with some additional features. Note that each of the functions is labelled dynamically. To apply an action to a DATA LIST prior to sending it to the current selection, hold down the ALT(option) key as you click on the name of the DATA LIST, this will activate the actions buttons.

To use the actions select the relevant radio button and click the ACTION button. Note that this will immediately interact with the current frontmost window, there is no feedback.

### ***'Save selection to (Named selection) List'***

This will take the selection in the current frontmost window and save it to the selected DATA LIST providing this is in the relevant category for that data, if the selection is not in the correct category you will receive a message from the system advising you of that fact. You may highlight records within the current displayed selection to save those to a DATA LIST (even one record). By default this button will ADD to the DATA LIST. To overwrite the DATA LIST with the selected records use the 'Save updated list' check box.

### ***'intersect(Named ) list & current selection'***

This option will pass the named DATA LIST to the frontmost window where it will be intersected with the selection of records in that window. The current selection will be updated displaying just the records from the DATA LIST which are also in the current selection. Using the 'Save updated List' will pass this updated selection to the Data list manager and the saved DATA LIST will be updated.

### ***'Remove Current selection from(named) list'***

This option will pass the DATA LIST to the frontmost window where the records in the current selection will be removed from the DATA LIST and the remainder of the DATA LIST will be displayed. Using the 'Save updated List' will pass this updated selection to the Data List manager and the saved DATA LIST will be updated.

### ***'Remove list from Current Selection'***

This option will pass the DATA LIST to the frontmost window where the records in the DATA LIST will be removed from the current selection and the remainder of the current selection will be displayed. Using the 'Save updated List' will pass this updated selection to the Data List manager and the saved DATA LIST will be updated.

## **The Buttons**

### **ADD CATAGORY**

This button allows you to add new catagories manually to the Data list manager. Adding a catagory manually allows you to name the catagory as you wish rather than having it named with the default name assigned when the catagory is automatically created.

### **ADD LIST**

This button allows you to create new (empty) DATA LIST within a catagory, select a catagory first then click this button. The default name for the DATA LIST is highlighted ready for you to enter the required List

### **LIST FROM SET**

This button is provided to enable compatibility with the old SETS MANAGER. This will allow you to select a previously saved set from your hard disk and create a DATA LIST t using that set.

### **SET FROM LIST**

This button is provided to enable writing a set out to disk, to save the current selection, rather than a DATA LIST to a set on disk hold down the alt(option) key and click this button. To save a DATA LIST out to disk select the DATA LIST name in the Data List manager and click this button.

### **LIST RULES**

This button is probably the most powerful feature of the Data List manager. With carefull thought this can save you many hours in your current work. Think of all the times that you search for records move the selection to another table do another search. By recreating those steps into a set of list rules you can have a dynamic selection. You should be familiar with creating Macros if you wish to create list rules. List rules may also be applied to a DATA LIST where the criteria will intersect with the named set to produce a dynamic subselection.

### **DELETE LIST**

This button will allow you to remove a DATA LIST from the data list manager.

### **SHARE LIST**

This check box allows you to share, and unshare, a DATA LIST with other people in your workgroup.

## **Other features.**

Dragging from any list of records using the dragger button and dropping on a category will create a new DATA LIST-providing it is the correct category for the current selection.

Dragging from any list of records using the dragger button and dropping on a DATA LIST name will add to the saved DATA LIST-providing it is the correct category for the current selection.

Holding the alt(option) key and dragging from any list of records using the dragger button and dropping on a DATA LIST name will OVERWRITE the named selection-providing it is the correct category for the current selection.

Highlighting records in a listing window and using the dragger button to drag them to a DATA LIST will not change the current selection.

Clicking on a named selection will cause the current selection in the frontmost window to be updated to display the selected DATA LIST.

Resize the screen for your session by clicking in the Bottom Right hand Corner and dragging to the required size.