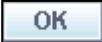
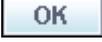


Customizing A Grid Lesson

Step	Action
1.	<p>System enhancements may result in repositioning columns or adding new to the grid to allow users to view/search on additional fields.</p> <p>If you have a customized grid for an application, you may need to "Delete" the customized grid and "Create" a new customized Grid. If you have this application set as a Favorite on your menu, you may need to "Remove from Favorites" then add it back to Favorites.</p>
2.	<p>Creating a new format allows you to personalize the format of a grid. You can change:</p> <ul style="list-style-type: none"> Column sequence Column text properties Column background color How the rows are sorted <p>Warning: Never change the formatting on the Default Format. It is recommended that you create a format named Default Format to preserve the standard grid format for easy reference, then create other tabs with special formatting.</p>
3.	<p>Navigate to any grid in the Payroll & Financial Center that you may wish to customize. Grids can be customized all through out the Payroll & Financial Center including Address Book, General Accounting, Fixed Assets, Procurement Accounts Payable, Inventory, Sales Order, Accounts Receivable etc.</p> <p>Note: Always begin this task from an unpopulated grid.</p> <p>Note: In the example in this training guide we will use Account Ledger Inquiry. Click the State of Nebraska link.</p> <p>State of Nebraska</p>
4.	<p>Click the Accounting link.</p> <p>Accounting</p>
5.	<p>Click the Inquiries & Reports link.</p> <p>Inquiries & Reports</p>
6.	<p>Click the Accounting Inquiries link.</p> <p>Accounting Inquiries</p>
7.	<p>Click the Account Ledger Inquiries link.</p> <p>Account Ledger Inquiries</p>
8.	<p>Click the Account Ledger Inquiry link.</p> <p>Account Ledger Inquiry</p>
9.	<p>Click the Customize Grid link to display the Customize Grid window.</p> <p>Customize Grid</p>

Step	Action
10.	Click the Create button. 
11.	In the Grid Format Name field, type a new name for the customized grid. 
12.	Customizing columns allows you to arrange the grid in a format that meets your needs and preferences. For example, you might want to search by Purchase Order. In that case, you might prefer to have that column all the way to the left of the grid. You might also prefer to have the area code and phone number columns in a different typeface or color to set them apart from the addresses.
13.	You can select the categories you would like to be displayed as columns. There are two lists displayed: Available Columns and Display and Order . Available Columns lists all columns that can be included in your customized format. Display and Order shows the columns, in
14.	The up and down arrows under the Display and Order list will change the order in which a column is displayed. To change the order of a column, select the column name by clicking on it and then click the up or down arrow to move it. Note: Promoting a column will move it to the left of the search window. Demoting it will move it to the right.
15.	The single arrow pointing to the right will add one column at a time from Available Columns and the dsingle arrow pointing to the left will remove one column at a time from Display and Order .
16.	Another custom feature is you can change the color of a specific column and how the text displays in that column. First find the Column you want to change by clicking it in the Display and Order Field . The system will auto populate the Selected Column .
17.	Click the color you would like the column to be in the spectrum bar under Column Color . Click the Spectrum Bar button. 
18.	Note: A code will appear in the Column Color field.
19.	Click the color you would like the font to be in the spectrum bar under Text Color . Click the Spectrum Bar button. 
20.	A code will appear in the Text Color field.
21.	You can change the font to be bold, italic, underlined, or have a strikethout. To select one or more of these font options click the check box next to the option. 

Step	Action
22.	Warning: Clicking Update Style is useful if you are multi-tasking and at-risk of being logged off by the system due to inactivity. If this should happen and you have not clicked Update Style , you may lose those changes.
23.	You will see two lists: Available Columns and Sequenced Columns . Available Columns lists all columns that can be included in your customized format. Sequenced Columns shows the columns, in order, by which the records will be sorted.
24.	Use the arrows between the fields to add or remove columns. Use the up and down arrows below the Sequenced Columns field to change the order of the sequenced columns.
25.	The sequence will be decending by default. You can change it to ascending by clicking the Ascending check box. Note: Promoting a column to the top of Sequenced Columns means the Payroll & Financial Center will sort the grid first by that column. Demoting it to the bottom means the Payroll & Financial Center will sort the grid last by that column. Removing it entirely from Sequenced Columns means the Payroll & Financial Center will not use that column at all for sorting purposes. Note: An (A) or (D) next to the sequenced column will prompt you if your sort is ascending or descending, respectively.
26.	Click the OK button when finished. 
27.	Click the Close button. 
28.	To bring up a grid, or refresh it, click the Find button. You may need to enter search criteria to bring up a grid.
29.	Once the grid is populated it will display with your customized grid format.
30.	You can change the grid format by selecting a different grid format from the drop down Customize Grid field.
31.	You can modify or delete a custom grid. To do so click the Customize Grid tab. Click the Customize Grid link. 
32.	Click the Modify button. 
33.	To change the name of the grid click in the Grid Format Name field and enter the new name.
34.	You can modify your grid in ways we have already demonstrated.
35.	When finished click the OK button at the bottom of the page. 
36.	To delete a grid, first click on it's name in the Select Grid Format field.

Step	Action
37.	Click the Delete button. 
38.	The grid you deleted will no longer appear in the Select Grid Format .
39.	Click the Close button. 
40.	Click the Close button. 
41.	You have successfully completed this lesson. End of Procedure.