

Customizing A Grid

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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

Table of Contents

Customizing A Grid.....	1
Customizing A Grid Overview.....	1
Customizing A Grid Lesson	1

Customizing A Grid

Customizing A Grid Overview

You can customize your grid in the Payroll & Financial Center to make it easier to navigate and to make your work easier and faster. At a search window, you can customize the sequence of the columns in the detail area, or "grid," to increase efficiency, to fit your working style, and to see the information you need in the order you need to see it. Then you can save your personal grid format you create and use it again.

This training guide will show you the following:

- To Create a New Grid Format
- To Select a Grid Format
- To Customize the Display and Order of the Columns
- To Change Column Color, Text Color, and Text Options
- Re-sequence Data in a Grid
- To Rename a Format
- To Delete a Format

Customizing A Grid Lesson

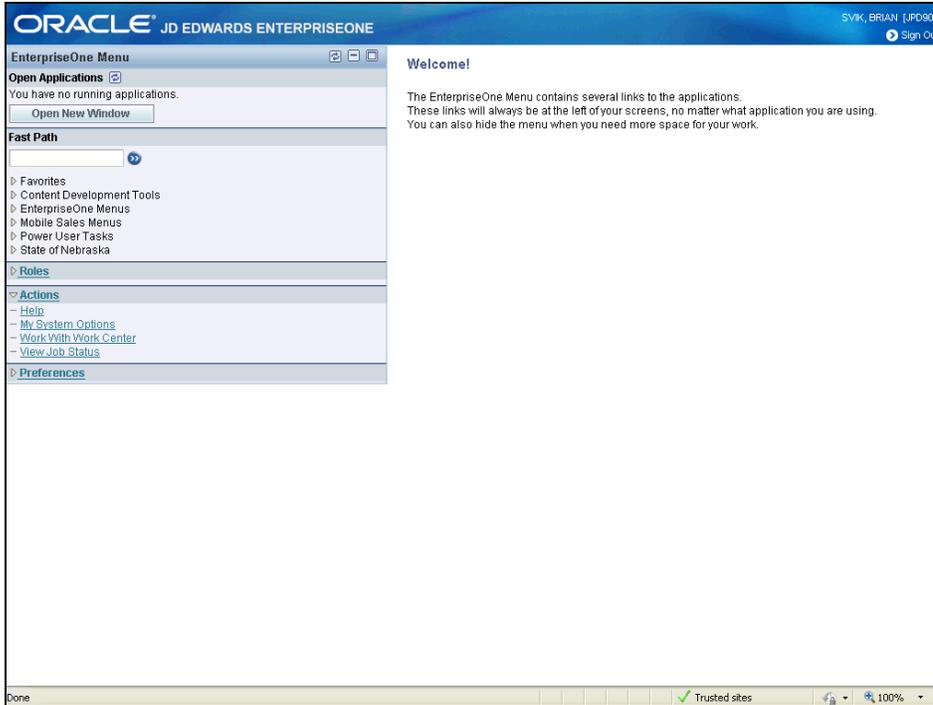
Procedure

In this lesson you will learn how to customize a grid in the Payroll & Financial Center.

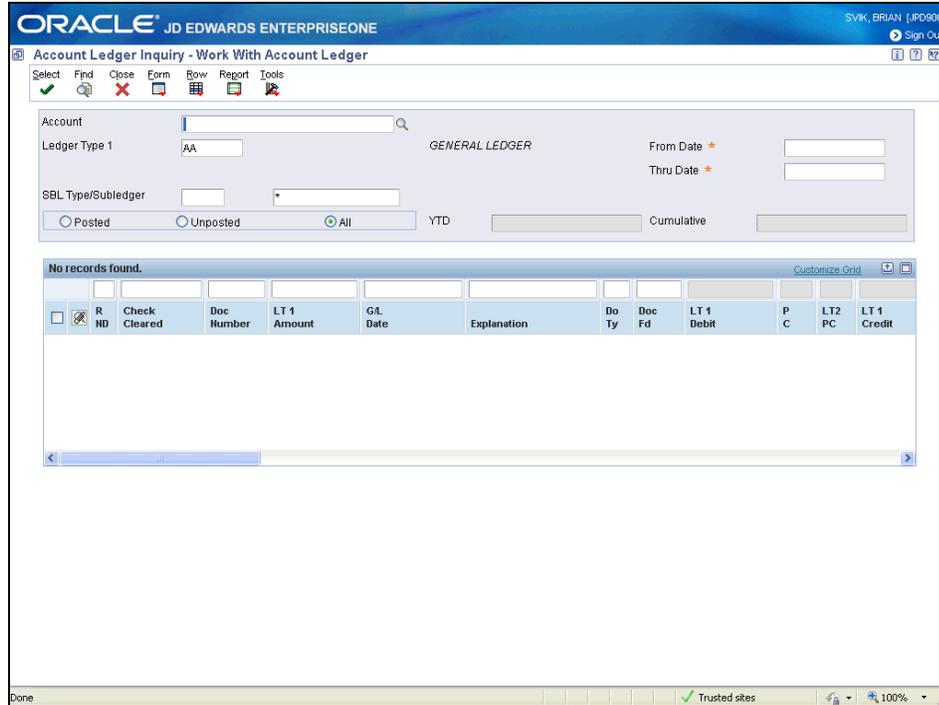
Step	Action
1.	<p>System enhancements may result in repositioning columns or adding new to the grid to allow users to view/search on additional fields.</p> <p>If you have a customized grid for an application, you may need to "Delete" the customized grid and "Create" a new customized Grid. If you have 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>

Training Guide

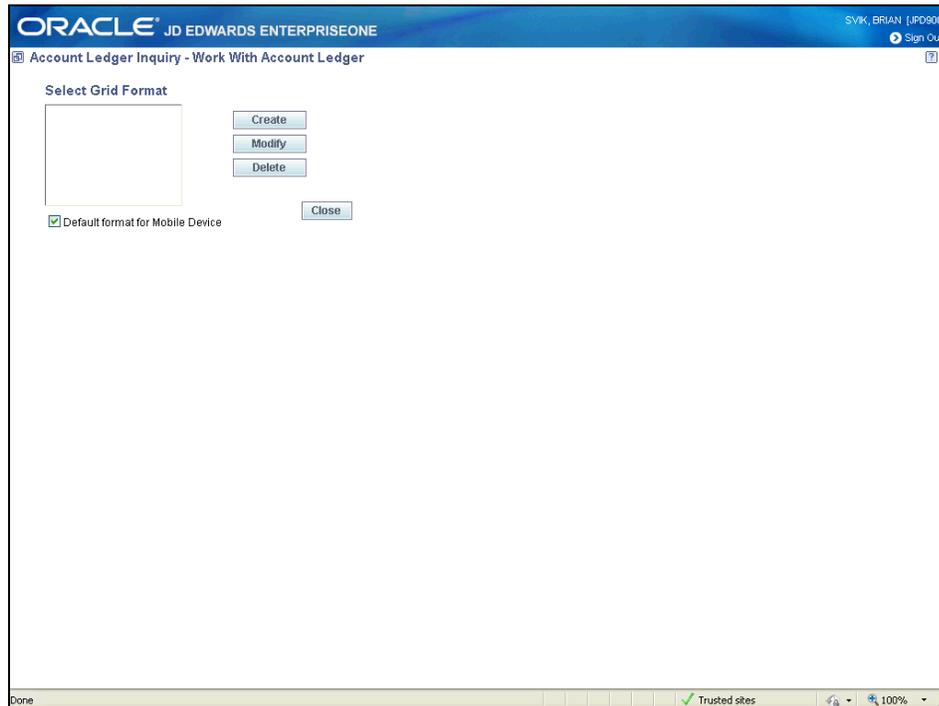
Customizing A Grid



Step	Action
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><u>State of Nebraska</u></p>
4.	<p>Click the Accounting link.</p> <p><u>Accounting</u></p>
5.	<p>Click the Inquiries & Reports link.</p> <p><u>Inquiries & Reports</u></p>
6.	<p>Click the Accounting Inquiries link.</p> <p><u>Accounting Inquiries</u></p>
7.	<p>Click the Account Ledger Inquiries link.</p> <p><u>Account Ledger Inquiries</u></p>
8.	<p>Click the Account Ledger Inquiry link.</p> <p><u>Account Ledger Inquiry</u></p>

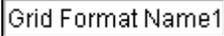


Step	Action
9.	Click the Customize Grid link to display the Customize Grid window. Customize Grid



Training Guide

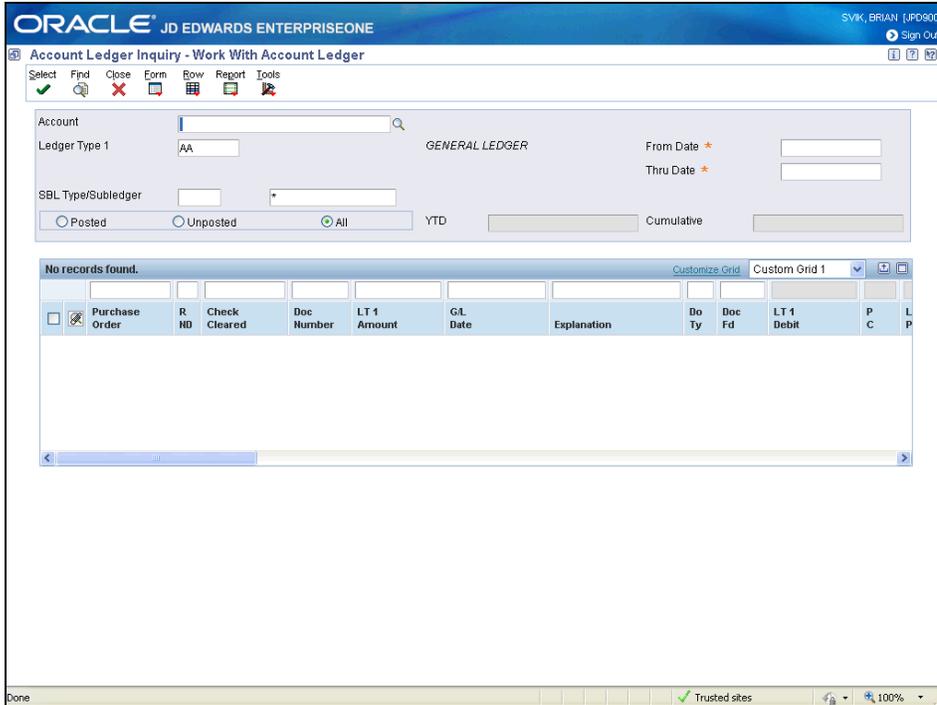
Customizing A Grid

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.

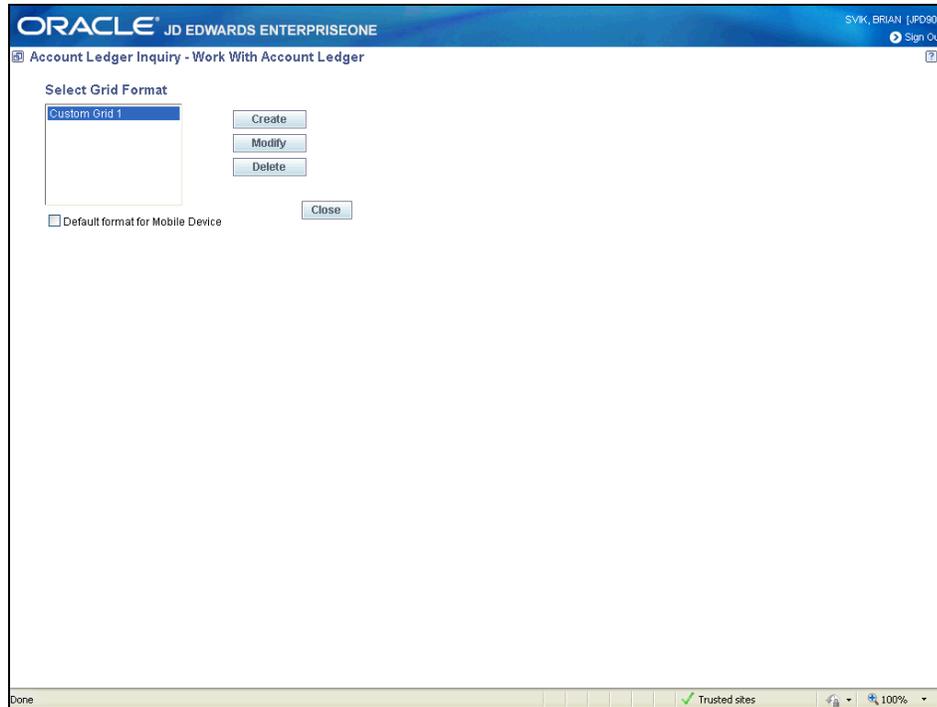
Step	Action
21.	<p>You can change the font to be bold, italic, underlined, or have a strikethout. To select one or more of these font options click the check box next to the option.</p> 
22.	<p>Warning: Clicking Update Style is useful if you are multi-tasking and at-risk of being logged off by the system due to inactivity. If this should happen and you have not clicked Update Style, you may lose those changes.</p>
23.	<p>You will see two lists: Available Columns and Sequenced Columns.</p> <p>Available Columns lists all columns that can be included in your customized format.</p> <p>Sequenced Columns shows the columns, in order, by which the records will be sorted.</p>
24.	<p>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.</p>
25.	<p>The sequence will be decending by default. You can change it to ascending by clicking the Ascending check box.</p> <p>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.</p> <p>Note: An (A) or (D) next to the sequenced column will prompt you if your sort is ascending or descending, respectively.</p>
26.	<p>Click the OK button when finished.</p> 
27.	<p>Click the Close button.</p> 

Training Guide

Customizing A Grid



Step	Action
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. Customize Grid



Step	Action
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.
37.	Click the Delete button. 
38.	The grid you deleted will no longer appear in the Select Grid Format .
39.	Click the Close button. 

Training Guide

Customizing A Grid

ORACLE JD EDWARDS ENTERPRISEONE SVK, BRIAN (JPD900) Sign Out

Account Ledger Inquiry - Work With Account Ledger

Select Find Close Form Row Report Tools

Account: 56650 211700 REC'D - NOT VOUCHERED (S)
 Ledger Type 1: AA GENERAL LEDGER From Date: 07/01/2012
 Thru Date: 02/28/2013
 SBL Type/Subledger: *
 Posted Unposted All YTD: 18,020.09 Cumulative:

Records 1 - 6 Customize Grid

	R ND	Check Cleared	Doc Number	LT 1 Amount	G/L Date	Explanation	Do Ty	Doc Fd	LT 1 Debit	P C	LT2 PC	LT 1 Credit
<input type="checkbox"/>			721701	375.00-	02/20/2013	AVITAM CONSULTING I...	OV	56650		P		3
<input type="checkbox"/>			25618554	375.00	02/26/2013	AVITAM CONSULTING I...	PV	56650	375.00	P		
<input type="checkbox"/>						COLUMN TOTAL			375.00			3
<input type="checkbox"/>						LEDGER TOTAL						
<input type="checkbox"/>						POSTED TOTAL			375.00			3
<input type="checkbox"/>						UNPOSTED TOTAL						

Done Trusted sites 100%

Step	Action
40.	Click the Close button. 
41.	You have successfully completed this lesson. End of Procedure.