

Customizing a Grid

Overview

Customized grid formats in NIS appear to be linked to issues with corrupt ID's. We are encouraging Users to NOT customize grids. If a problem with data output arises and you have customized grids, we are asking all customization be deleted and for users to revert back to the default grids and re-perform the procedures, prior to making a call into the Help Desk.

You can customize NIS 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 work instruction shows how:

[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](#)

[To Resequence Data in a Grid](#)

[To Rename a Format](#)

[To Delete a Format](#)

Steps

To Create a New Grid Format

Creating new format allows you to personalize the format of a grid. You can change:

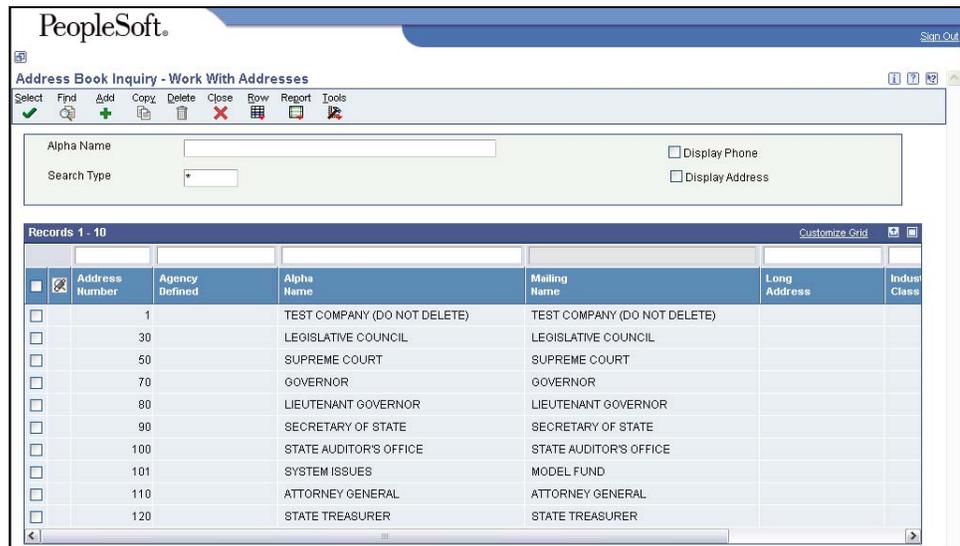
- Column sequence
- Column text properties
- Column background color
- How the rows are sorted

 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.

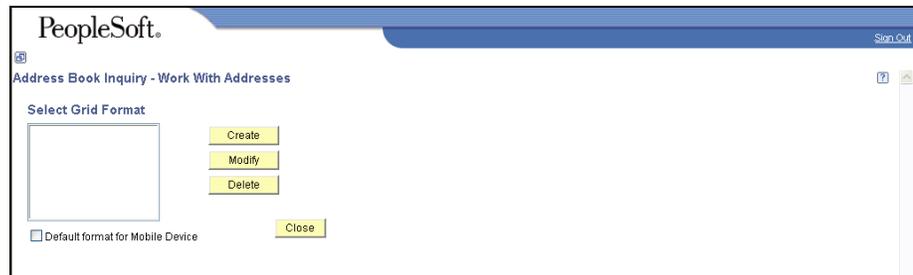
Start this instruction by navigating through the Address Book, General Agency Use menus, then clicking **Address Book Inquiry** to display the Address Book Inquiry - Work with Addresses window.

 Ordinarily, you would begin this task from an unpopulated grid. The first two steps of this task populate the grid, but that is strictly for presentation purposes.

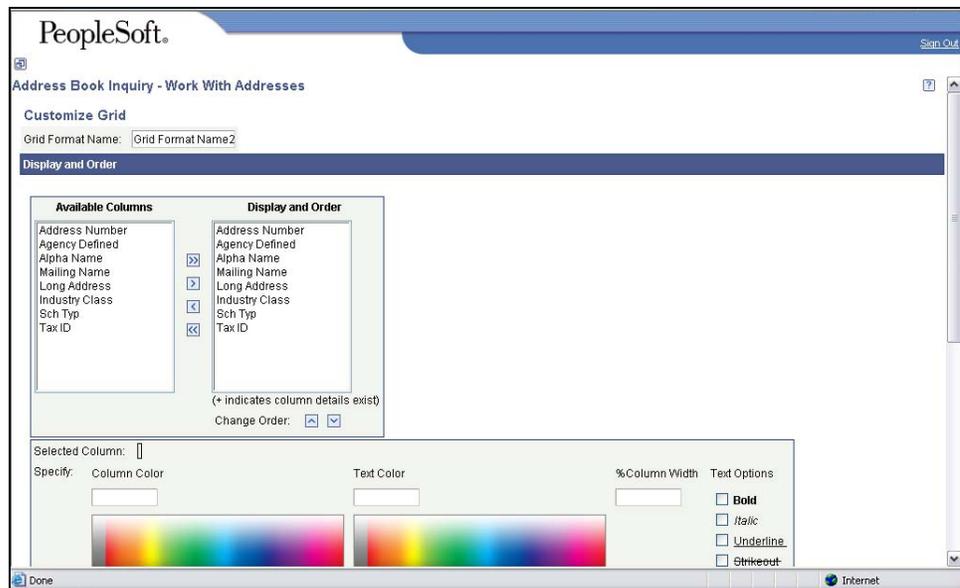
1. Type * in the Search Word field in the header.
2. Click **Find** to populate the grid.



3. Click **Customize Grid** to display the Customize Grid window.



4. Click **Create**.



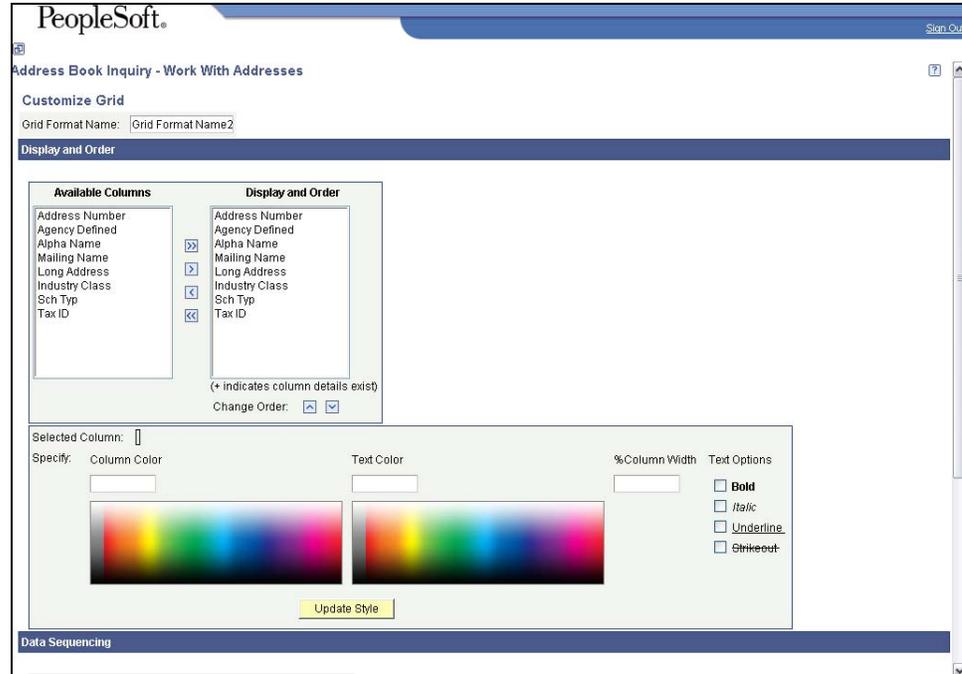
 This screen only shows the top portion of the window.

5. At the Select Grid Format window, type **Default** in the Format Name field, overriding the default, *Format Name1*.
6. Scroll to the bottom of the window.

 This screen only shows the bottom portion of the window.

7. Click **OK** to return to the Select Grid Format window.

8. Click **Create**.



9. Type **ABSearch** in the Format Name field, overriding the default, *Format Name2*.
10. Repeat steps 6 and 7.
11. Click **Close**.

To Select a Grid Format

1. From the search window, click the **Down arrow** next to the Customize Grid pull-down menu.
2. Click **ABSearch**.



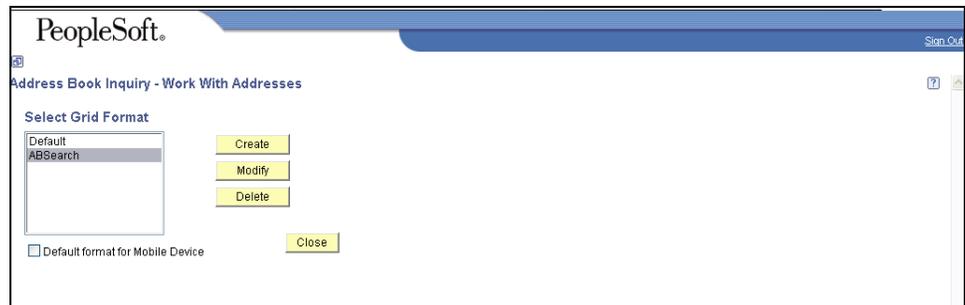
To Customize the Display and Order of the Columns

Customizing columns allows you to arrange the grid in a format that meets your needs and preferences. For example, you might want to sort by postal code, then by last name. In that case, you might prefer to have those two columns 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.

1. At the search window, select **ABSearch** from the Customize Grid pull-down menu.

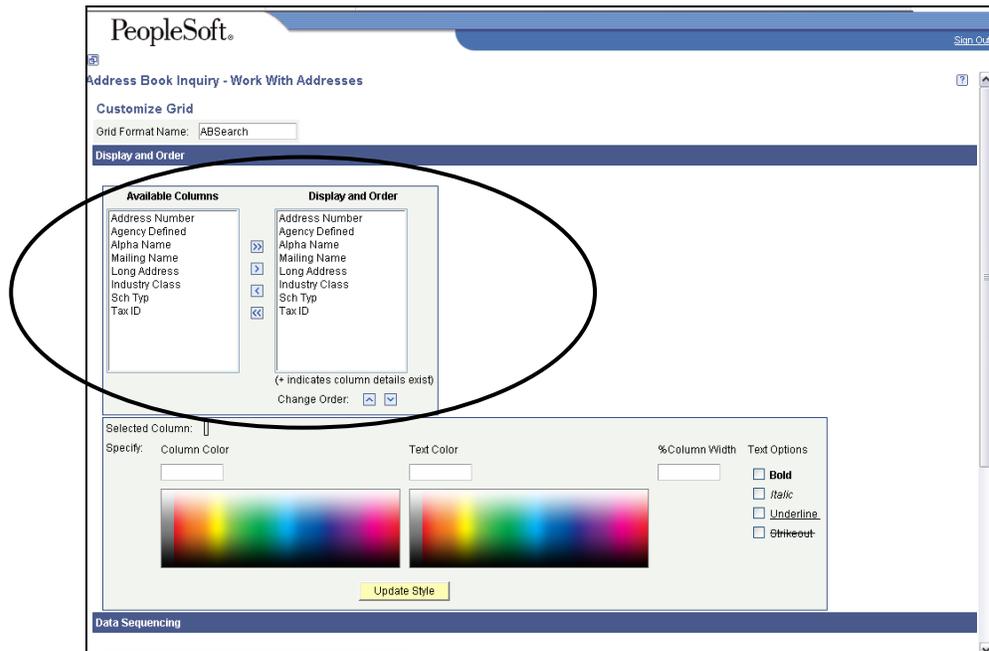
 In this exercise, we preserve the default grid settings as the Default format, while we customize the ABSearch format.

2. Click **Customize Grid**.
3. Verify that ABSearch is highlighted, then click **Modify**.



 You will see two lists: *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 order, in your customized format. Initially, Display and Order will be the same as in Default Format.

Image: Word Search Inquiry - A/B Word Search



4. Refer to the following table when performing tasks 5 through 8:

To	Do This
Add all Available Columns to Display and Order.	Click  .
Add one column to Display and Order.	1. Highlight the preferred column. 2. Click  .
Remove a column from Display and Order.	1. Highlight the preferred column. 2. Click  .
Remove all columns from Display and Order.	Click  .
Promote or demote a column within Display and Order.	Click  to promote or  to demote.

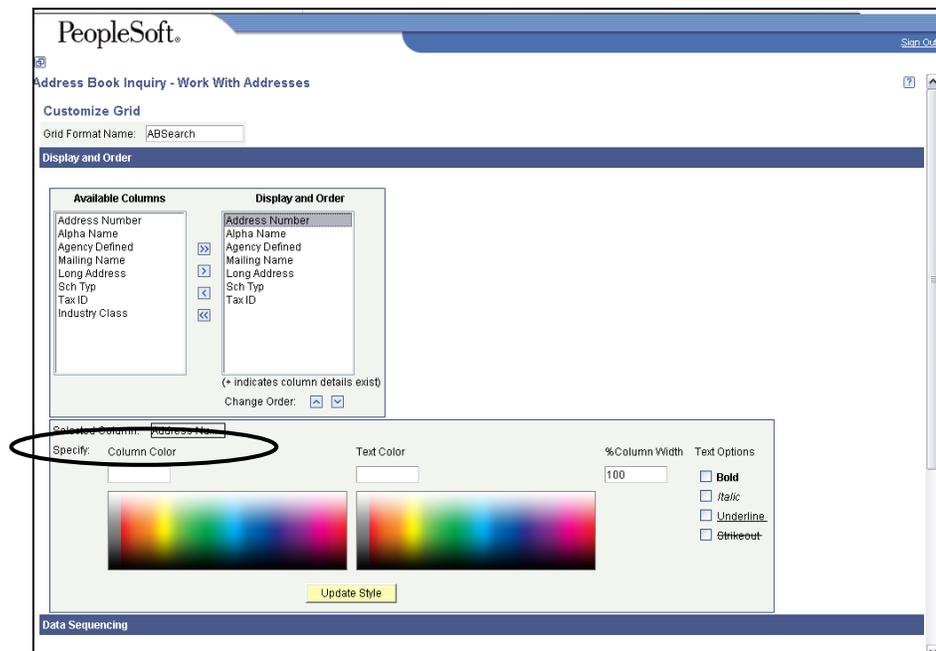
 Promoting a column will move it to the left of the search window. Demoting it will move it to the right.

5. Remove **Industry Class** from Display and Order.
6. Promote **Alpha Name** to follow Address Number.
7. Scroll down to the bottom of the window.
8. Click **OK**.
9. Click **Close** to return to the search window.
10. Verify that the columns in the search window will now reflect the customizing choices you made.

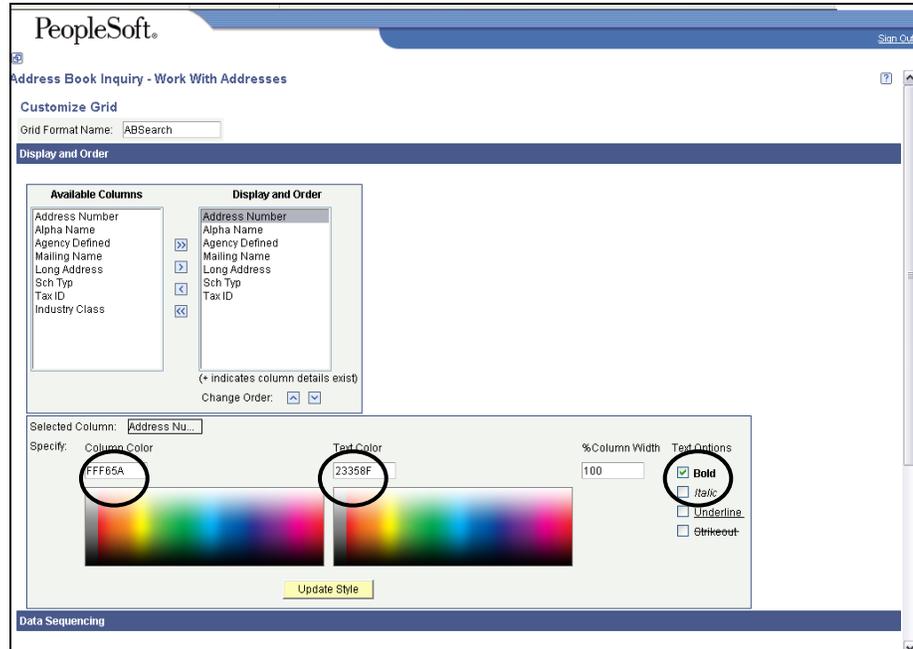
-  To save the changes you made without closing the A/B Word Search – Customize Grid window, click **Update Style** instead of **OK**. You might want to do this if you want to proceed with the steps under [To Change Column Color, Text Color, and Text Options](#) or [To Re-sequence Data in a Grid](#).
-  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.

To Change Column Color, Text Color, and Text Options

1. Click Customize Grid.
 2. Choose ABSearch, click **Modify**.
 3. Click (highlight) **Address Number** in the Display and Order list.
-  The column's name appears in the Select Column Name field.



4. Click in the **yellow** range for Column Color.
-  A code will appear in the Column Color field.
5. Click in the **dark blue** range for Text Color.
-  A code will appear in the Text Color field.
6. Choose **Bold** under Text Options.



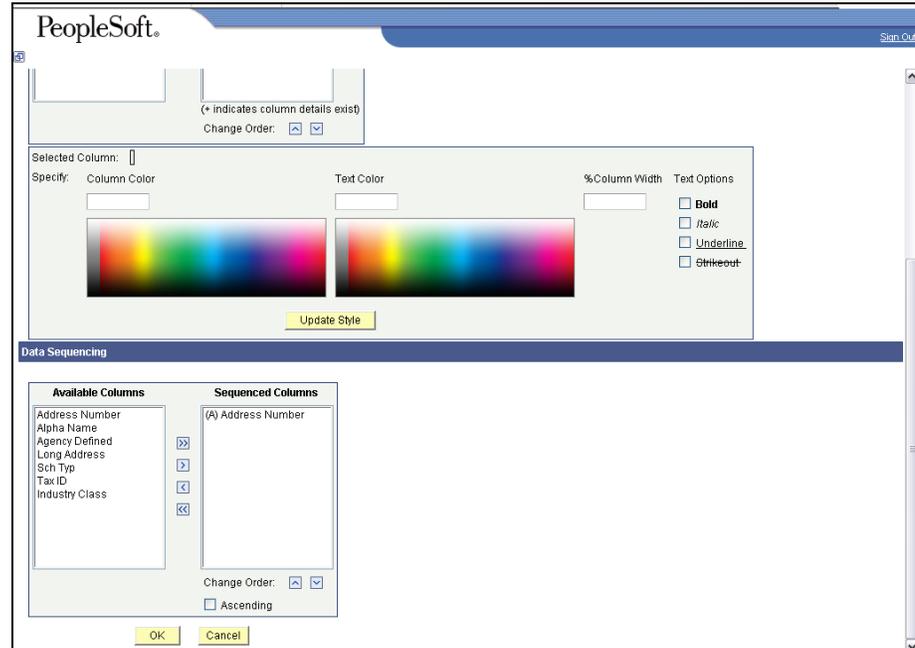
7. Click **OK**.
8. Click **Close** to return to the search window.
9. Verify that the Phone Number field is yellow, with bold, dark-blue text.



To Re-sequence Data in a Grid

1. Click **Customize Grid**.
2. Choose (highlight) **ABSearch** and click **Modify**.
3. Scroll down to the **Data Sequencing** heading.
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.



4. Refer to the following table when performing tasks 3 through 6:

To	Do This
Add all Available Columns to Sequenced Columns.	Click  .
Add one column to Sequenced Columns.	1. Highlight the preferred column. 2. Click  .
Remove a column from Sequenced Columns.	1. Highlight the preferred column. 2. Click  .
Remove all columns from Sequenced Columns.	Click  .
Promote or demote a column within Sequenced Columns.	Click  to promote or  to demote.

 Promoting a column to the top of Sequenced Columns means that NIS will sort the grid first by that column. Demoting it to the *bottom* means that NIS will sort the grid *last* by that column. Removing it entirely from Sequenced Columns means that NIS will not use that column at all for sorting purposes.

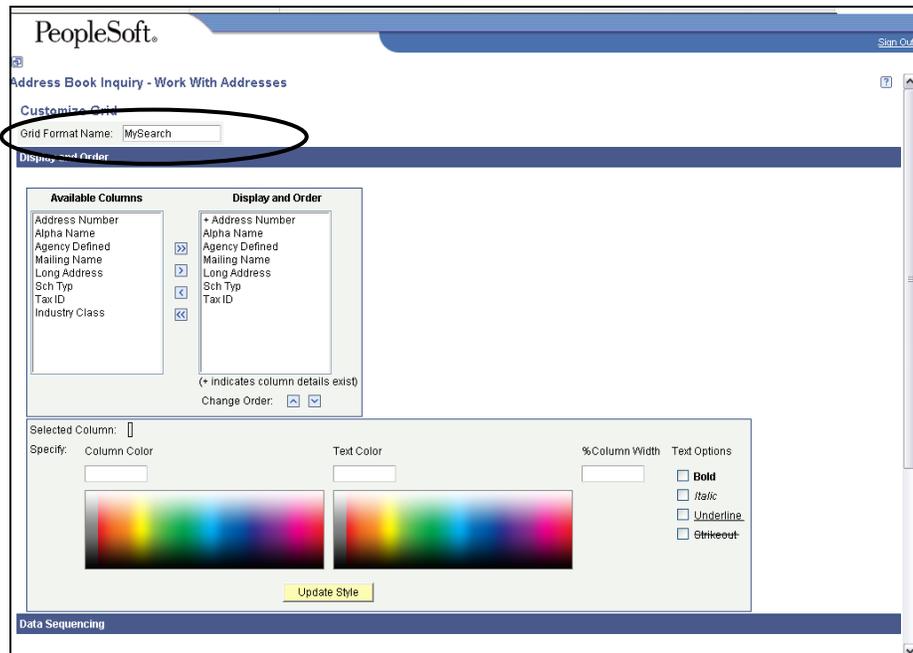
 An (A) or (D) next to the sequenced column will prompt you if your sort is ascending or descending, respectively.

5. Add **Alpha Name** to Sequenced Columns.
6. Promote **Alpha Name** to the top of the list.

7. Make Address Book a **descending** sort.
 8. Click **OK**.
 9. Click **Close** to return to the search window.
 10. Click **Find** to refresh the grid.
-  Ascending sorts on numeric fields will display records with values going up as you look down the search window. Descending sorts on numeric fields will display records with values going down.
 -  Ascending sorts on alphanumeric fields will display records in alphabetical order as you look down the search window. Descending sorts on alphanumeric fields will display records in reverse alphabetical.

To Rename a Format

1. At the Address Book Inquiry - Work with Addresses window, click **Customize Grid**.
2. Choose (highlight) **ABSearch**.
3. Click **Modify**.
4. Type **MySearch** in the Format Name field, overwriting *ABSearch*.



5. Scroll down to the bottom of the window.
6. Click **OK**.
7. Click **Close** to return to the search window.

To Delete a Format

1. From the Address Book Inquiry - Work with Addresses window, click **Customize Grid**.

2. At the Customize Grid window, click **MySearch**.
3. Click **Delete**.
4. Click **Close** to return to the search window.
5. Click the **Customize Grid pull-down menu** to verify that Default is the only option available.