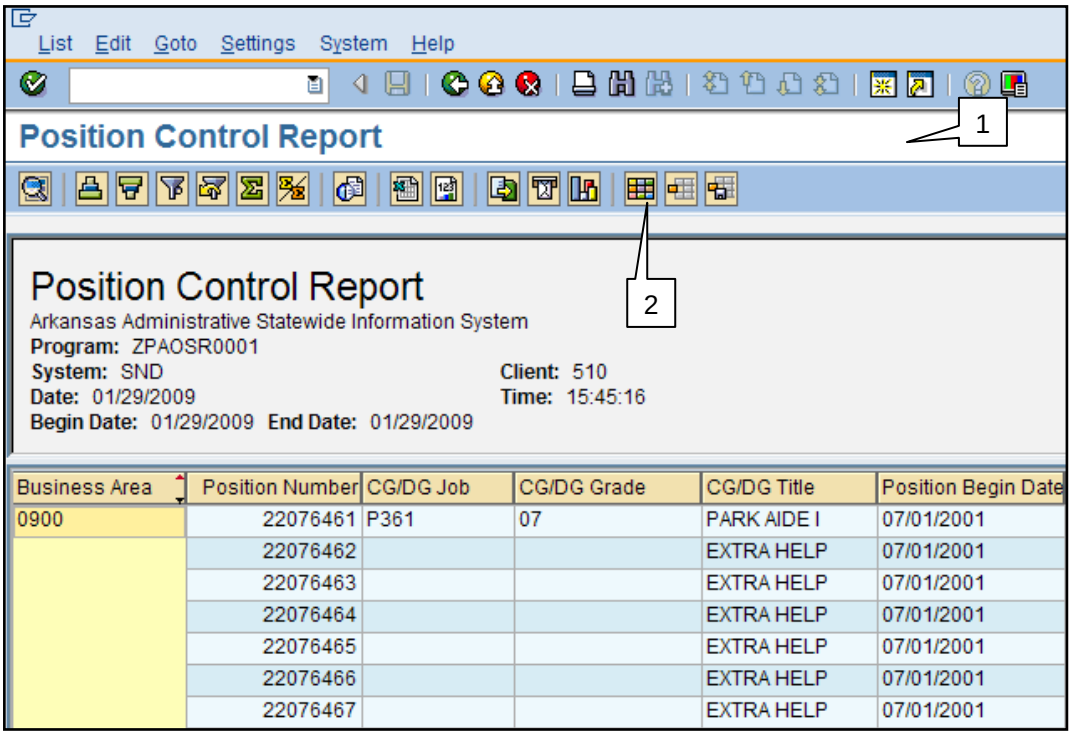
Customize Layouts

This process allows you to change the system default format of some reports.
Note: Not all reports have layouts that can be changed.

1. Select and execute the desired report.
2. Click the “Change layout” icon .



Business Area	Position Number	CG/DG Job	CG/DG Grade	CG/DG Title	Position Begin Date
0900	22076461	P361	07	PARK AIDE I	07/01/2001
	22076462			EXTRA HELP	07/01/2001
	22076463			EXTRA HELP	07/01/2001
	22076464			EXTRA HELP	07/01/2001
	22076465			EXTRA HELP	07/01/2001
	22076466			EXTRA HELP	07/01/2001
	22076467			EXTRA HELP	07/01/2001

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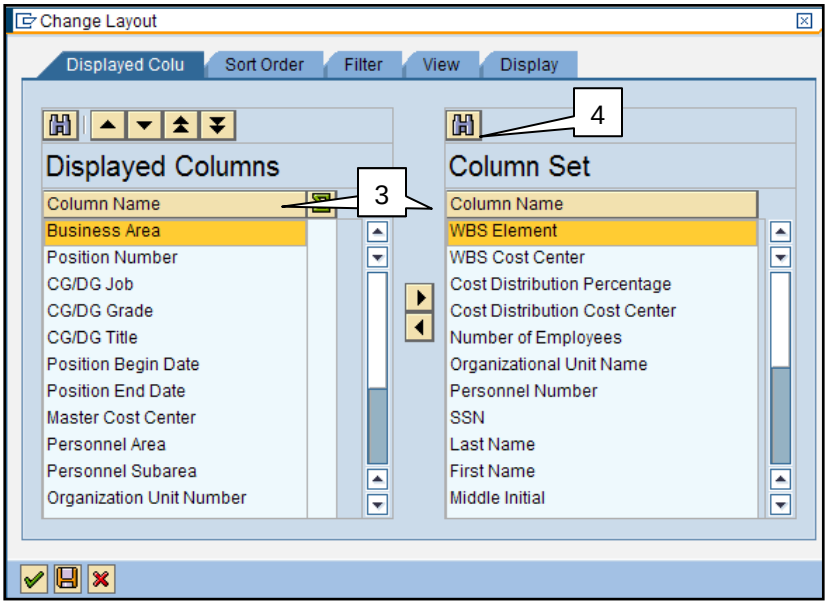
The “Displayed Column” (left) side of the *Change Layout* window lists the columns currently displayed on the report.

The “Column Set” (right) side lists hidden columns that can be added to the report.

3. Scroll through the possible selections.

Note: You can also use the “Find” icon to locate column choices. Our illustration uses this feature.



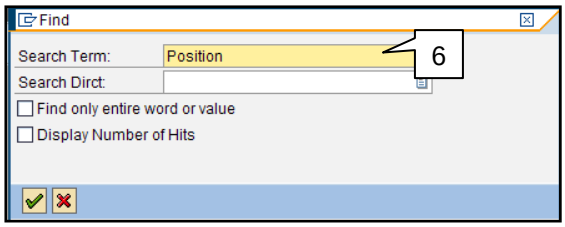
4. Click the “Find” icon.

The *Find* search window displays.

5. Type the field name in the find “Search Term” field.

*Note: Sometimes the technical name of a field may vary from what you think it should be. If you do not receive search results, try using a wildcard (*) in your search; for example, *Pos*.*

6. <Enter>



The selected column name is now highlighted.

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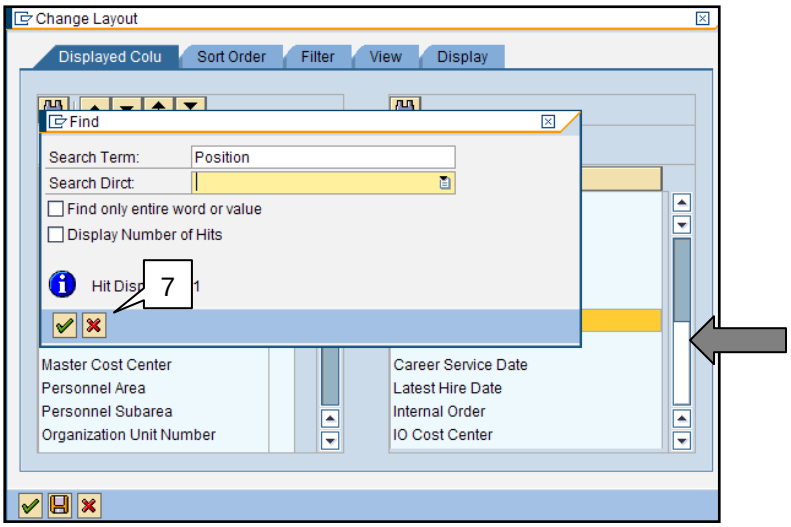
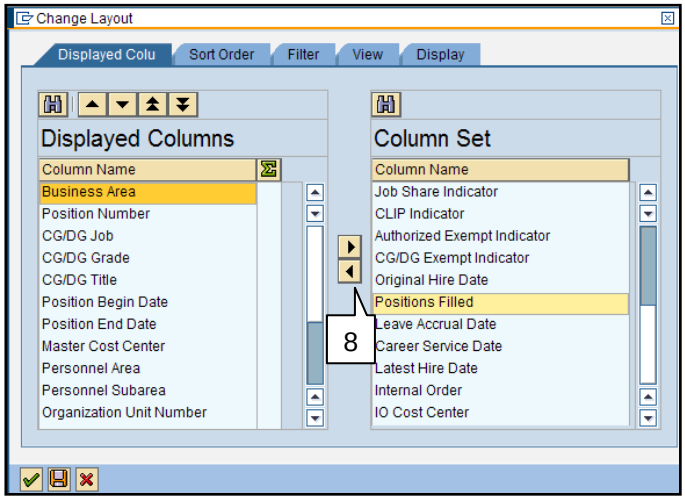
7. Click the “x” to close the box.



8. Click the left arrow to move the hidden field to the “Displayed Columns” box.



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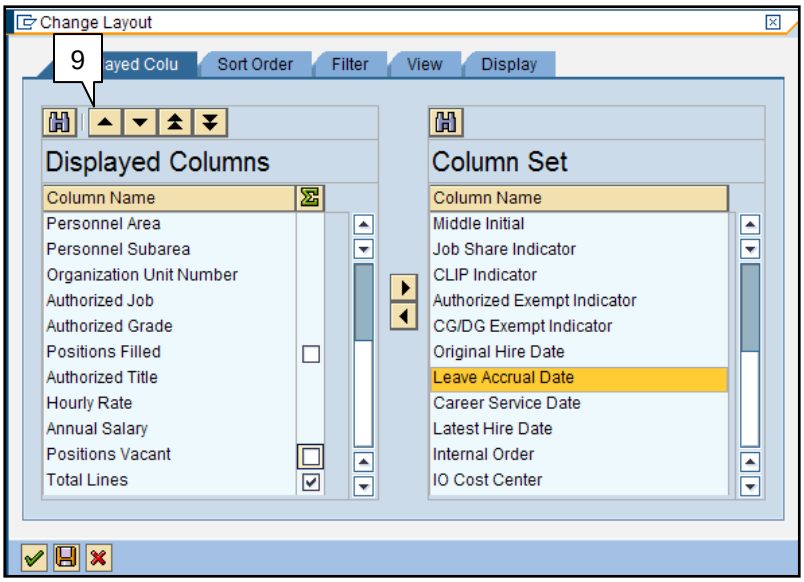
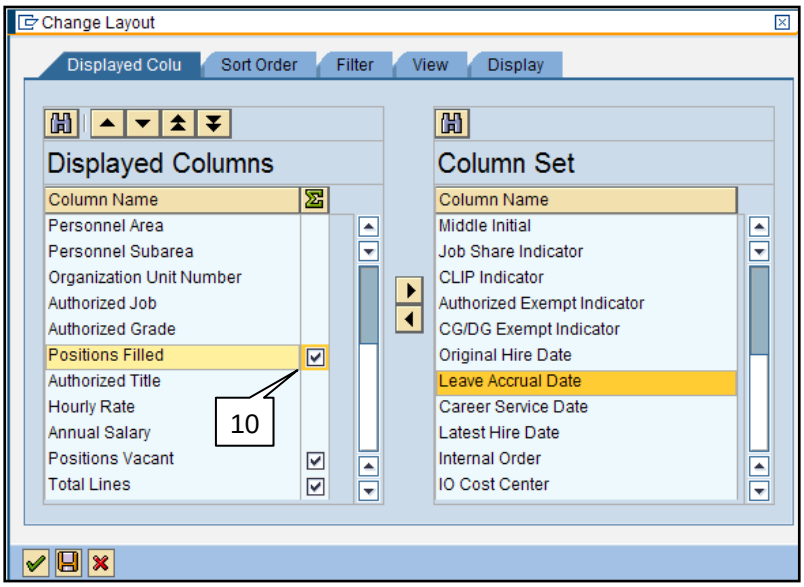
9. Use the up/down arrows to move the field to the desired position.



10. Total a column by clicking in the checkbox under the “Sum” column.

Note: Only numeric fields are totaled.



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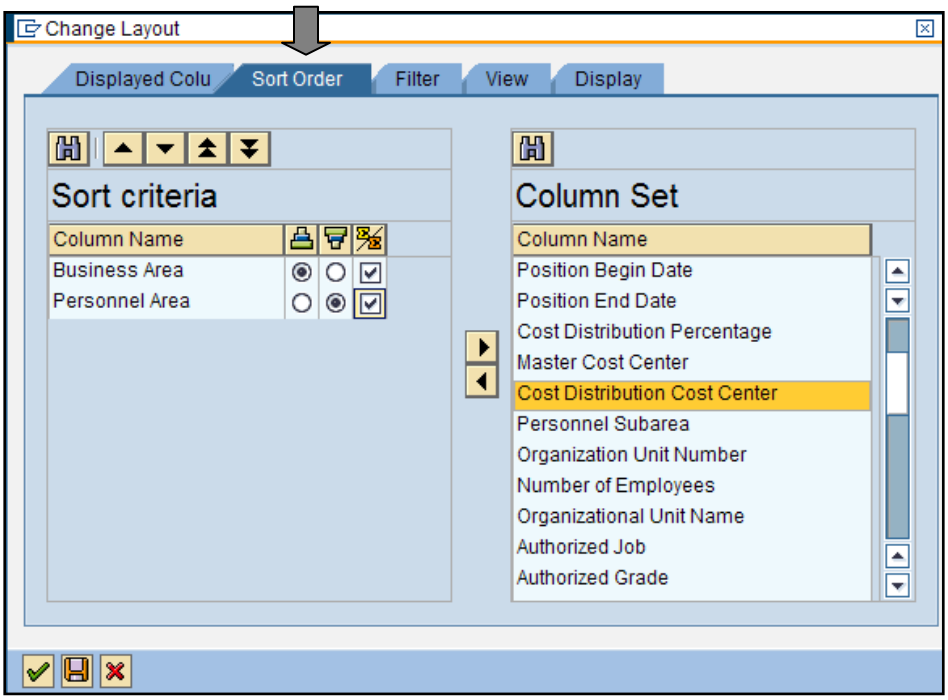
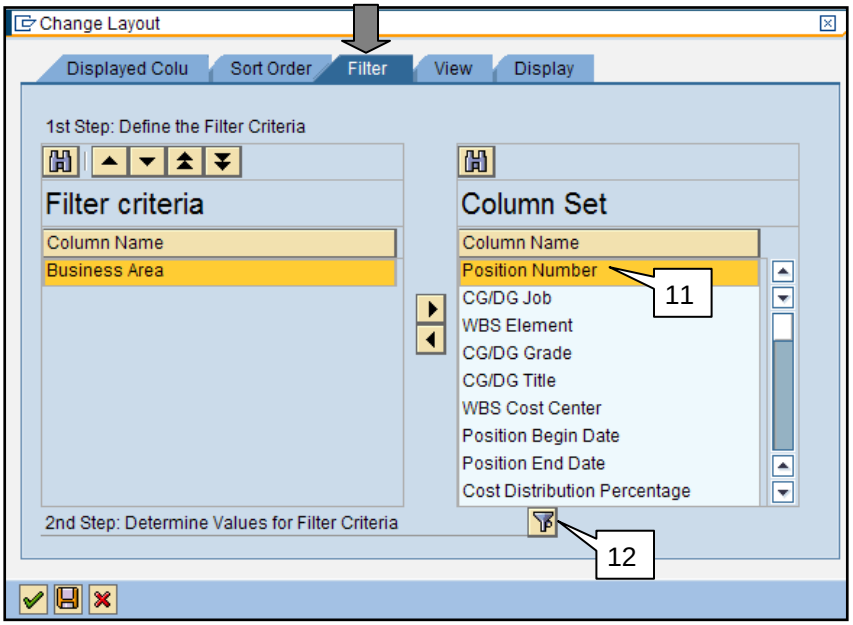
The *Sort Order* tab allows you to select a column to subtotal or sort in the report display.



Use the *Filter* tab to filter the display.

11. Select the column containing the desired item.
12. Click the “Filter” icon.



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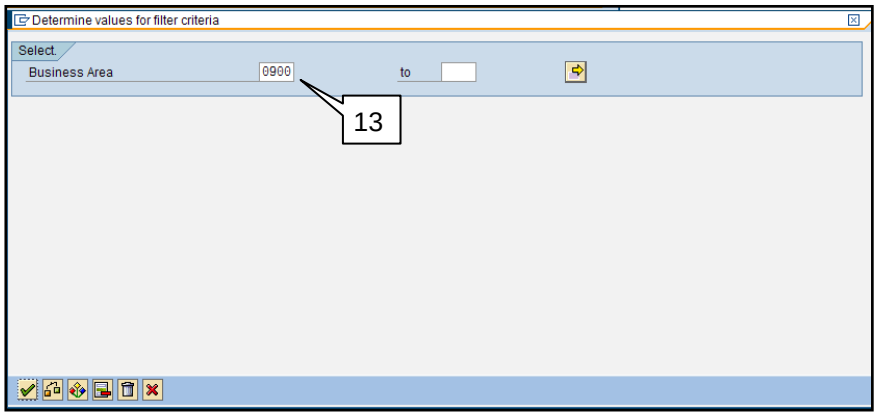
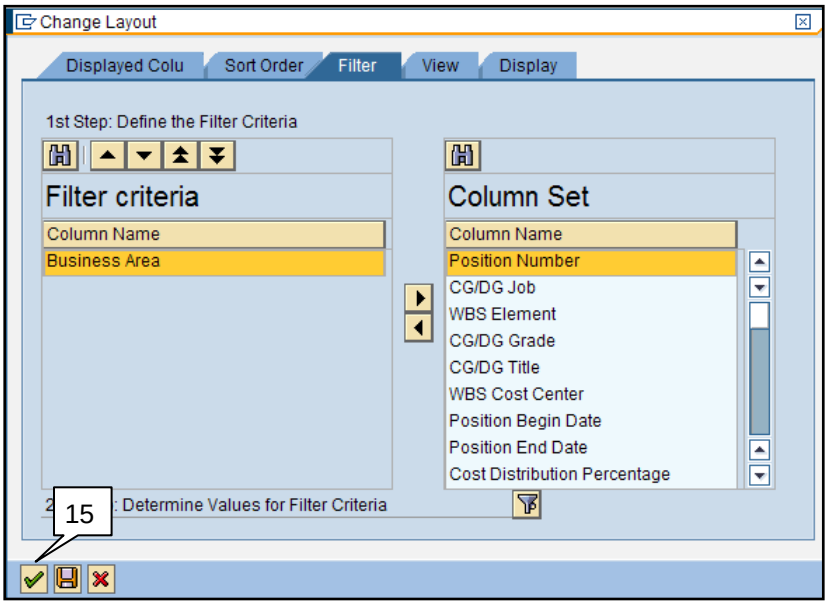
13. Enter the filter data.

In our illustration, we are filtering by *Business Area* information.

14. <Enter>

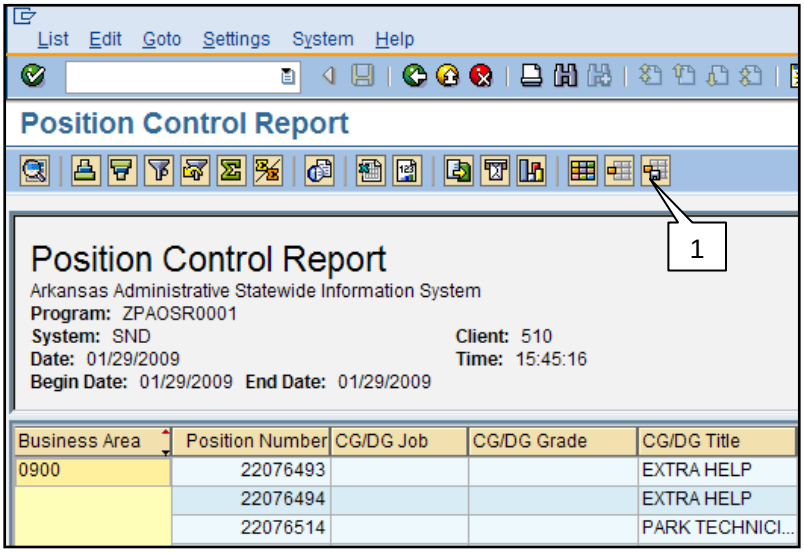


15. Once you have completed customizing the layout, click the green check ✔ at the bottom of the "Change Layout" window to display the modified layout.



Retrieve Custom Layouts

1. To save, click the “Save layout” icon.

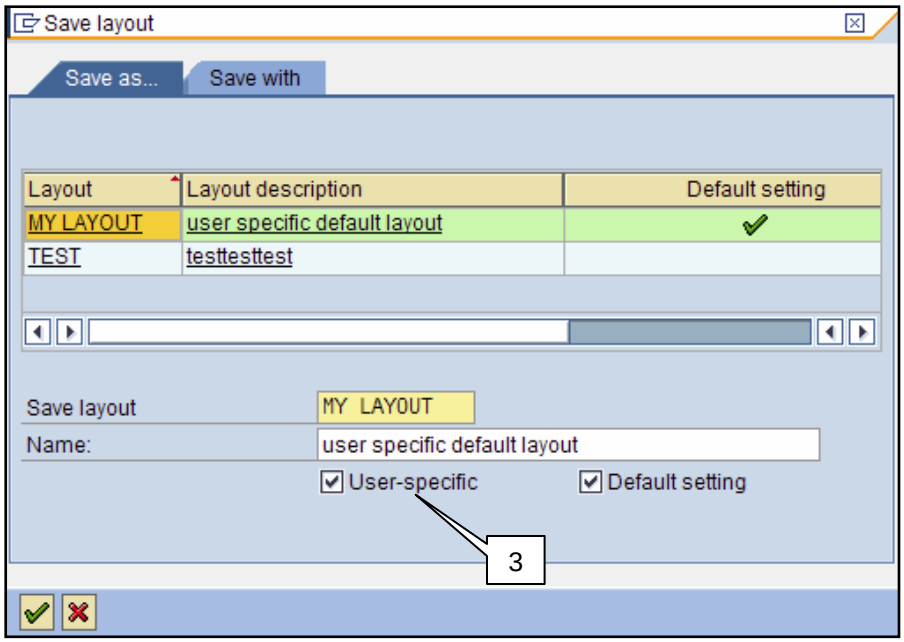


The *Save layout* window displays.

2. Name the layout using the “Save layout field.” *Never create a variant with a forward slash in front. For example: Instead of “ /My Layout,” use “My Layout” as illustrated below.*
3. Select “User specific” option (if not already selected).

A user specific layout is viewable by you alone. Always use this selection.

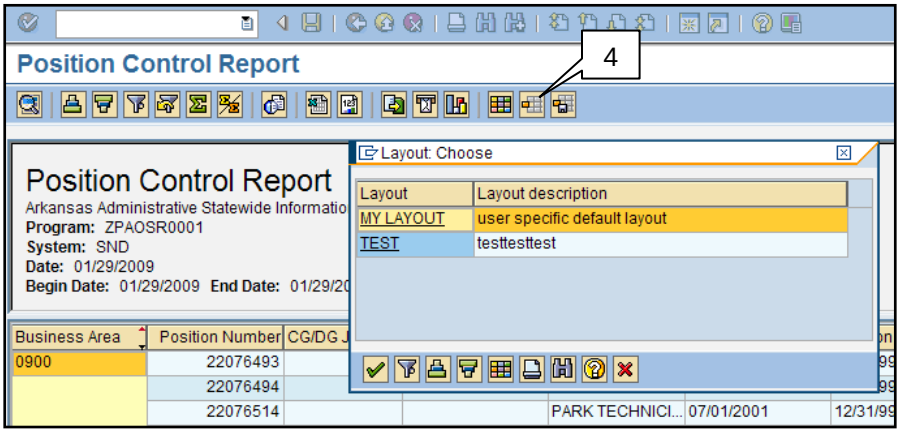
Our illustration uses the “Default setting” selection. *Note: Use the default setting if you want the report to display with this layout every time. Otherwise, do not select this option.*



Retrieve Custom Layouts

If you elect not to use a layout as the default, you can still retrieve and use the layout anytime you want.

4. Click the “Choose layout” icon .
5. Locate the layout (scroll bar)
6. Double click the layout



The report displays using the defined preferences.