Customizing the Display (cont.)

Other Settings via the Open Settings Dialog Button

1. To use more sorting options, (like removing subtotals, resetting a sort, or changing the subtotals), click on the Open Settings Dialog button to display the Settings dialog box.

2. Use the Sort Sequence, Calculation (Subtotal), and Display tabs along with the steps outlined in the following pages to customize the layout settings.
Customizing the Display (cont.)

Remove Automatic Subtotals When Sorting by Column Heading

On the Calculation tab in the **Settings** box:

1. Click on the **Calculation** tab.

2. **To remove the automatic subtotaling** that happens when sorting by column headings, click on the checkbox beside **Display Intermediate results for Sorted Columns** to deselect this defaulted option.

   *Note:* Remember that simply clicking on a column heading will sort and subtotal on that column heading by default.

3. Click **Apply** to see the changes in the grayed out view of the layout.

4. Click **OK** to display the subtotals added in the layout.

   *Note:* As long as this option is deselected, the subtotals will not automatically apply when clicking on a column heading to sort. This step must be repeated each time you exit and return to a layout.
Customizing the Display (cont.)

Remove Sort / Subtotal Selections

On the Sort Sequence tab in the Settings box:

1. Click on the **Sort Sequence** tab.
2. Click on a box under the **Sorted Columns** section and highlight the column to be removed from the sort sequence of the layout.
3. Click on the **Remove Item** button.

4. Click **Apply** to see the change in the grayed out view of the layout.
5. Click **OK** to remove the sort and review the results with the sorting and subtotaling removed from the layout.
6. Review the layout with sorting and subtotaling removed.
Customizing the Display (cont.)

Add Multiple Sort / Subtotal Selections

On the Sort Sequence tab in the Settings box:

1. Click on the Sort Sequence tab.
2. Click on the box to select and highlight one or more columns listed under Unsorted Columns (left side) that need to be included in the sort sequence of the layout.
3. Click on the Add Item button.
4. Review the columns added under the Sorted Columns section on the right.
5. As needed, click in the Sort Direction field to change the direction of the sort (ascending and descending) for each column displayed under the Sorted Columns section.
6. Click **Apply** to see the change in the grayed out view of the layout.

7. Click the **OK** button to add the sorting and subtotaling for the selected values.

8. Review the sorting changes made to the layout.
Customizing the Display (cont.)

Change Sort Order (Primary Sort, Secondary Sort, etc.)

On the Sort Sequence tab in the Settings box:

1. Click on the **Sort Sequence** tab.
2. If more than one column is displayed under *Sorted Columns*, click on the box to select the column name that needs to be moved in the sort order (from a secondary to primary sort in this example).
3. Use the **Up** and **Down** buttons at the bottom of the *Sorted Columns* section to move the highlighted column name up or down the list which changes the sort order (moved up in this example).
4. Click **Apply** to see the changes in the grayed out view of the layout.

5. Click **OK** to display the sort order changes in the layout.

6. Review the sorting changes made to the layout.
Customizing the Display (cont.)

Change Columns that Calculate Totals in the Layout

On the Calculation tab in the Settings box:

1. Click on the **Calculation** tab.

2. Review the list of Column Names on the left side of the box that are available to show calculated totals at the bottom of the layout.

3. **To remove the automatic subtotaling** that happens when sorting by column headings, click on the checkbox beside **Display Intermediate results for Sorted Columns** to deselect this defaulted option.

4. Use the drop-down in the Calculation column to choose other options for calculating subtotals as needed.

   **Note:** Remember that simply clicking on a column heading will sort and subtotal on that column heading. The Calculation function is for providing **Total rows for the columns that can provide a total amount for the layout**.

5. Click **Apply** to see the changes in the grayed out view of the layout.

6. Click **OK** to display the subtotals added in the layout.
Customizing the Display (cont.)

Change Other Display Options in the Layout

On the Display tab in the *Settings* box:

1. Click on the **Display** tab.

2. Review the display options available for the layout such as number of displayed rows, number of displayed columns and options for grid lines and adjust as needed.

3. Click **Apply** to see the changes in the grayed out view of the layout.

4. Click **OK** to display the rows and columns selected for the layout.