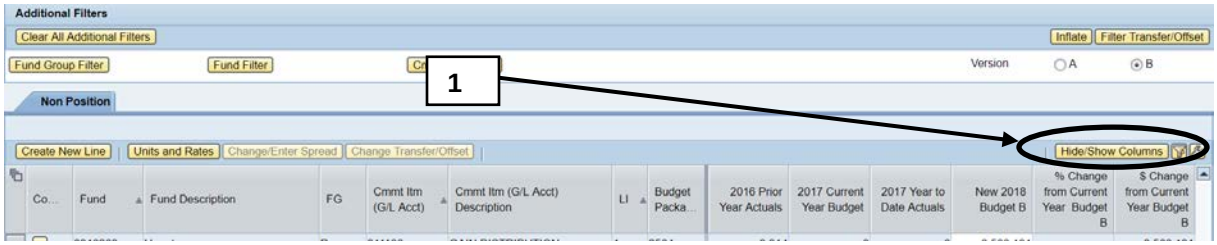
Customizing the Display of the Layout

The layouts within the Budget tool provide several ways to customize your display. These steps are applicable across the layouts and Budget tool functions.

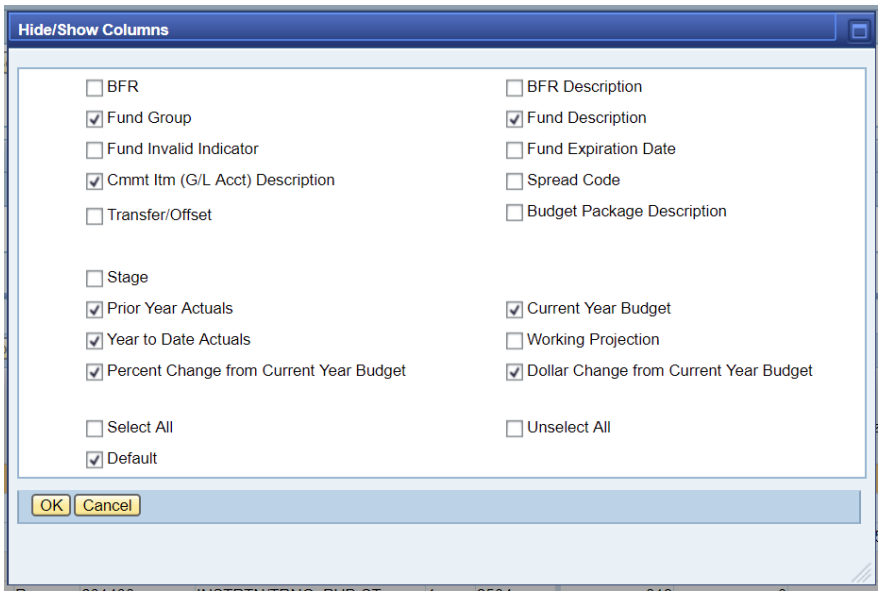
Note: Customized layouts are not saved. You will be returned to the default layout each time you go into a layout in the Budget tool.

Hide and Show Columns



1. To hide or show columns displayed in the layout, click on the **Hide/Show Columns** button.

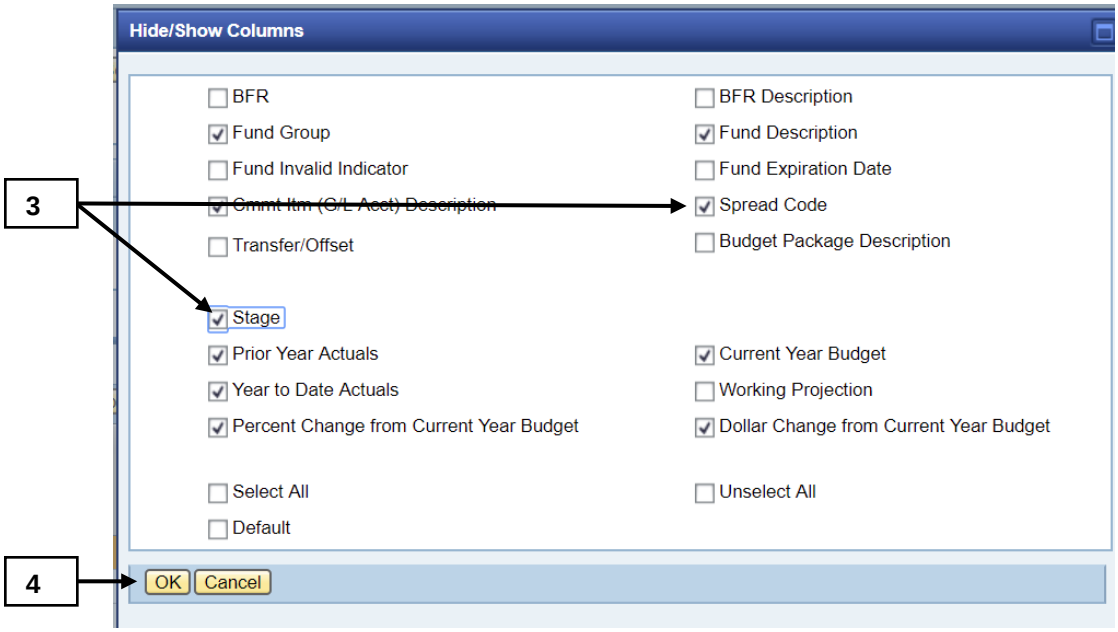
In the resulting *Hide/Show Columns* window:



Note: A check beside a column name indicates the column is already displayed in the layout.

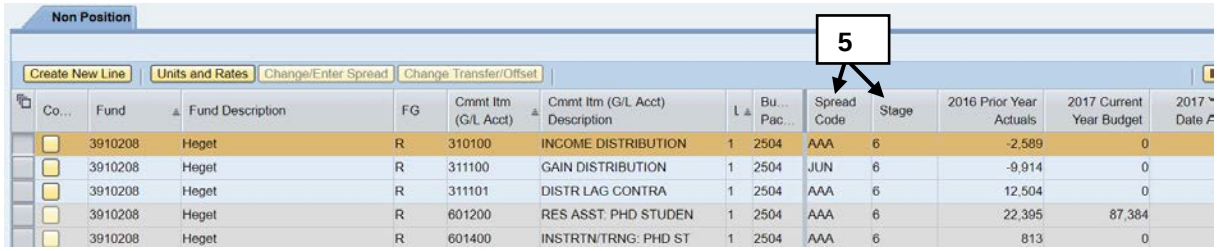
2. Review the column names already checked and currently displayed in the layout.

Customizing the Display (cont.)



3. **Click in the boxes** beside the column names **to check and uncheck the columns** to be displayed (in this example **Spread Code and Stage** were selected with checks to show those columns).

4. Click **OK** when done.



5. Review the extra column(s) now hidden or showing in the layout (in this example, both Spread Code and Stage were checked and displayed in the layout.

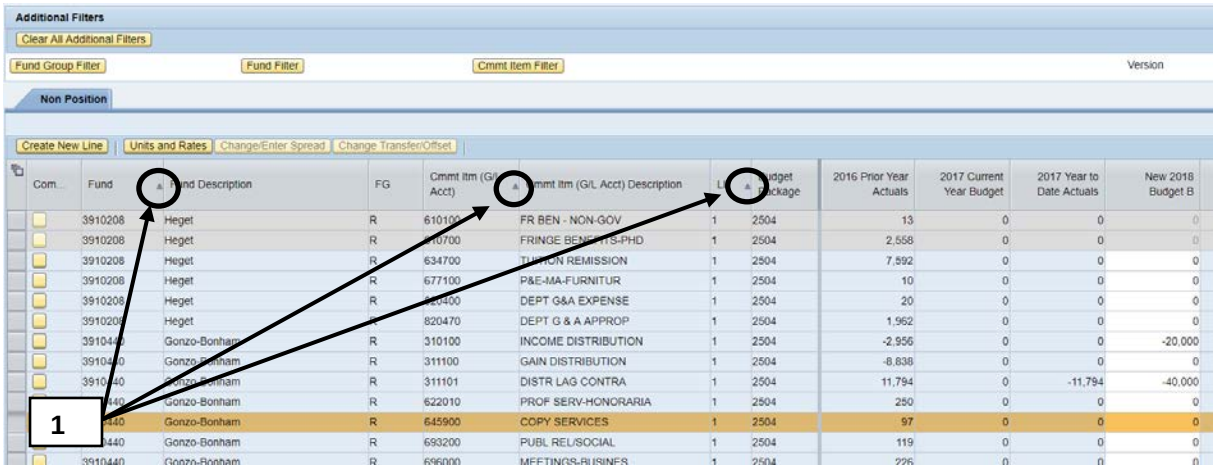
Note: Some planning functions within a layout might require you to first show a column before using that function. One example is in the Budget Development Non-Position layout, you must add the Spread Code column before you can use the Enter Spread Code button.

Customizing the Display (cont.)

Sort and Subtotal by a Column

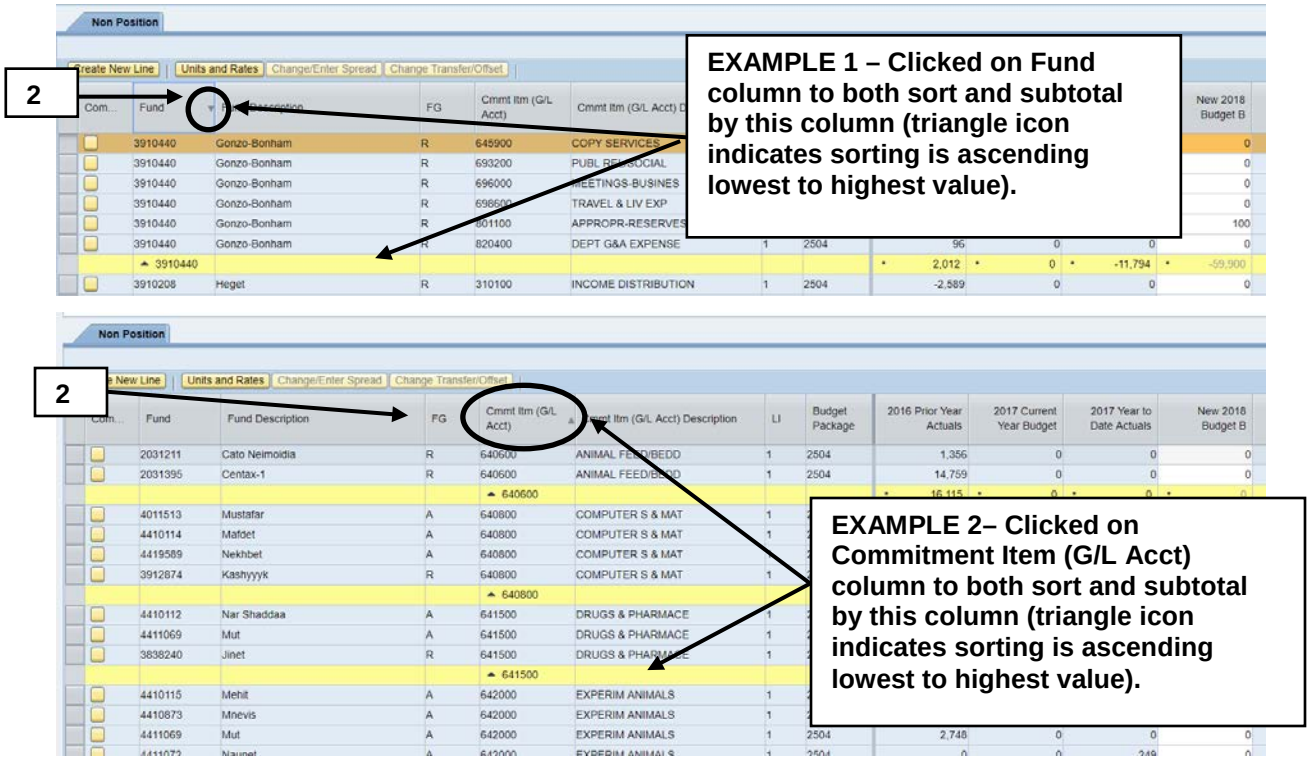
The layouts within a column already have sorting by certain columns. However, there is no subtotaling associated with those sorted columns in the original view based on the selection by BFR or by Package.

IMPORTANT: Sorting by a column using the steps in this section will also provide subtotaling by that column. These steps apply to sorting on one column heading at the time. See the Add Multiple Sort/Subtotal Section for information on sorting on more than one column.



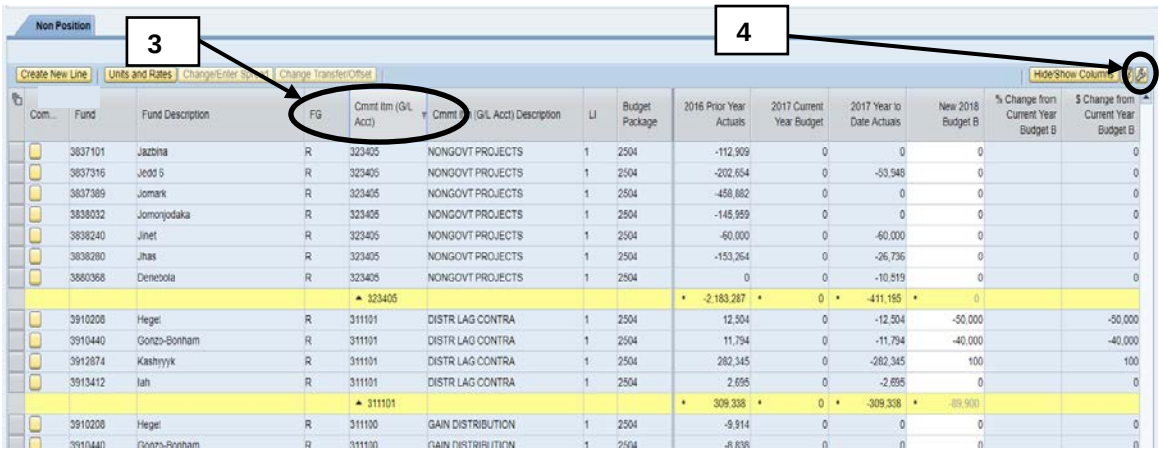
1. Before sorting by a column, review the original layout and the triangle icons in the column heading indicating how the layout is sorted by default (no subtotals are associated with the columns that are sorted in the original view of a layout).

Customizing the Display (cont.)



2. To sort and subtotal by one column, simply click on the column heading desired (see two examples above, one by Fund, the other by Commitment Item).

Customizing the Display (cont.)

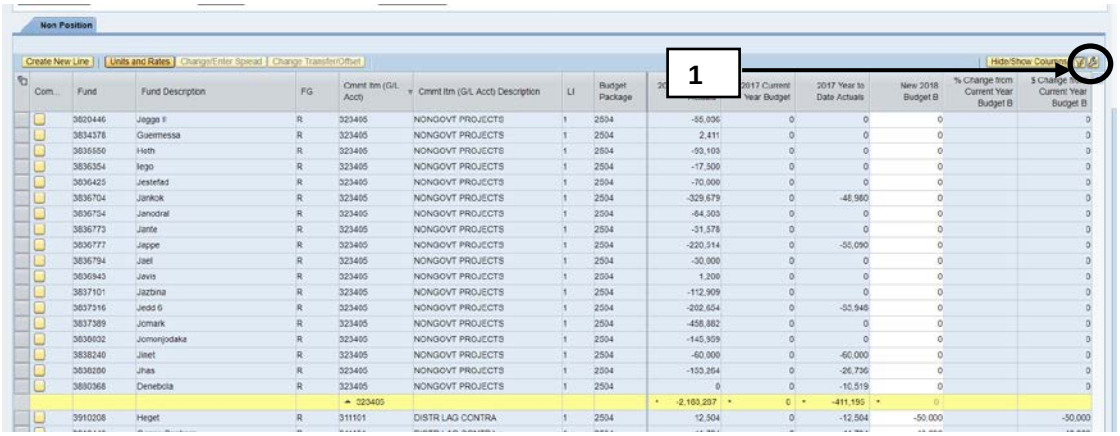


3. To change the sort order from Ascending (lowest to highest value) to Descending (highest to lowest value) simply **click on the column heading again to reverse the order** of the sort.

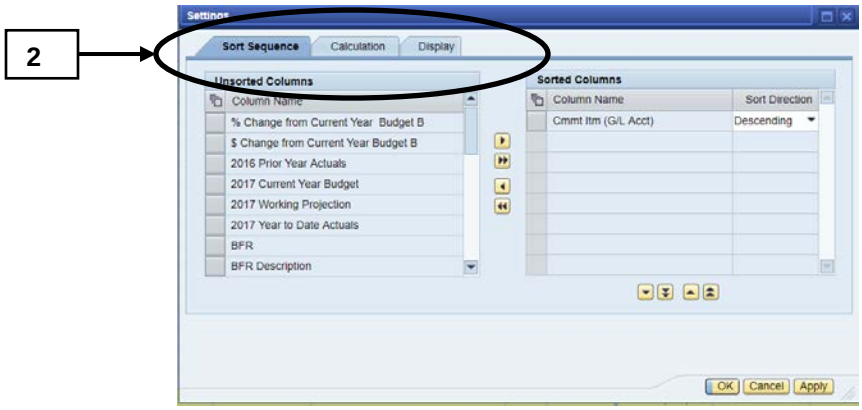
4. To remove the subtotal associated with sorting, to remove the sort and subtotal combination or to sort by multiple columns, see the steps in the Other Settings via the Open Settings Dialog Button section of this chapter using the **Open Settings Dialog** (Wrench) icon.

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.

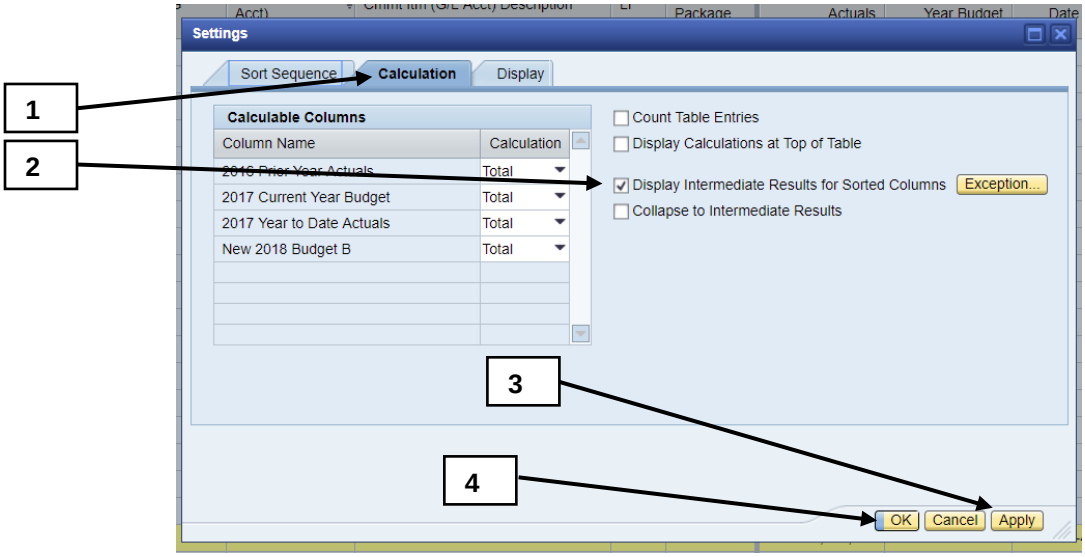


2. Use the Sort Sequence, Calculation (Subtotal), and Display tabs along with the steps outlined in the following pages to customize the layout settings.

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.

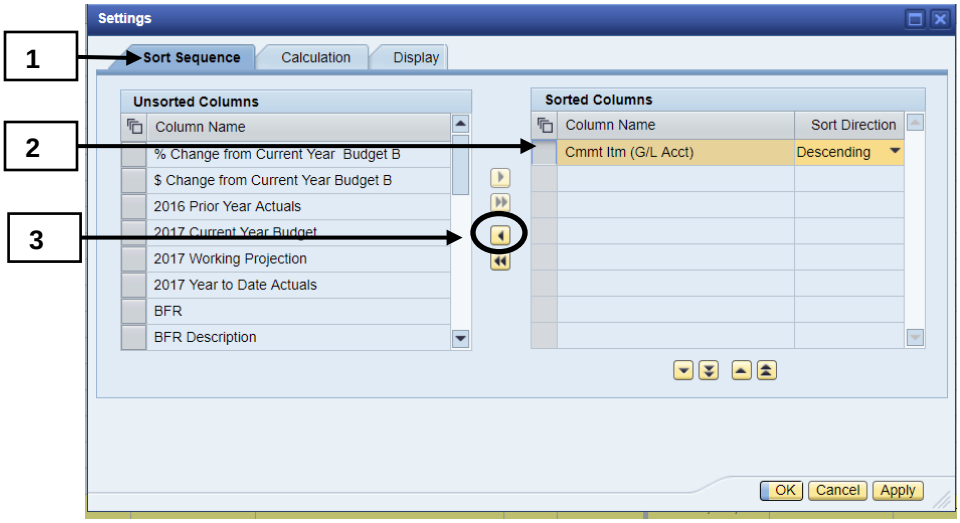
4. Click **OK** to display the subtotals added in the layout.

   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.

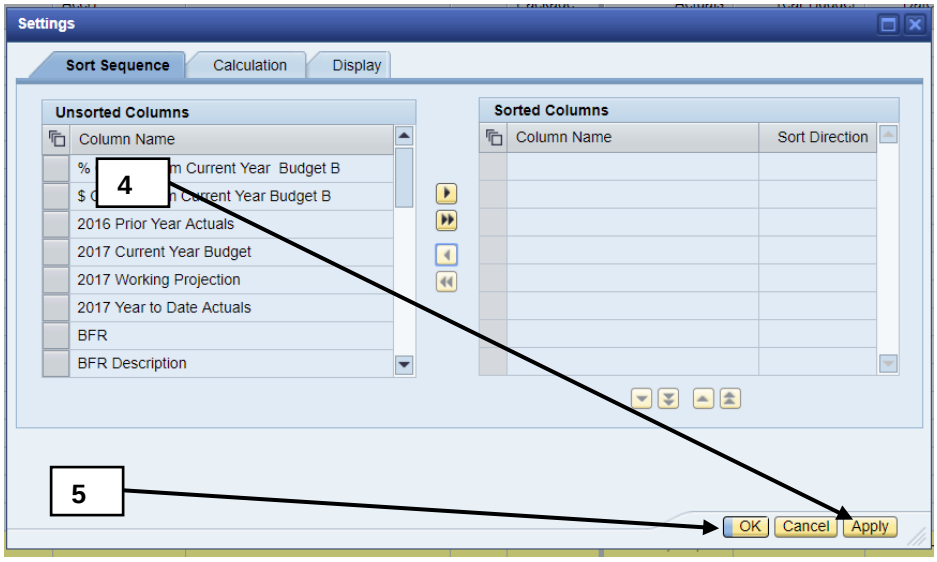
Customizing the Display (cont.)

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.

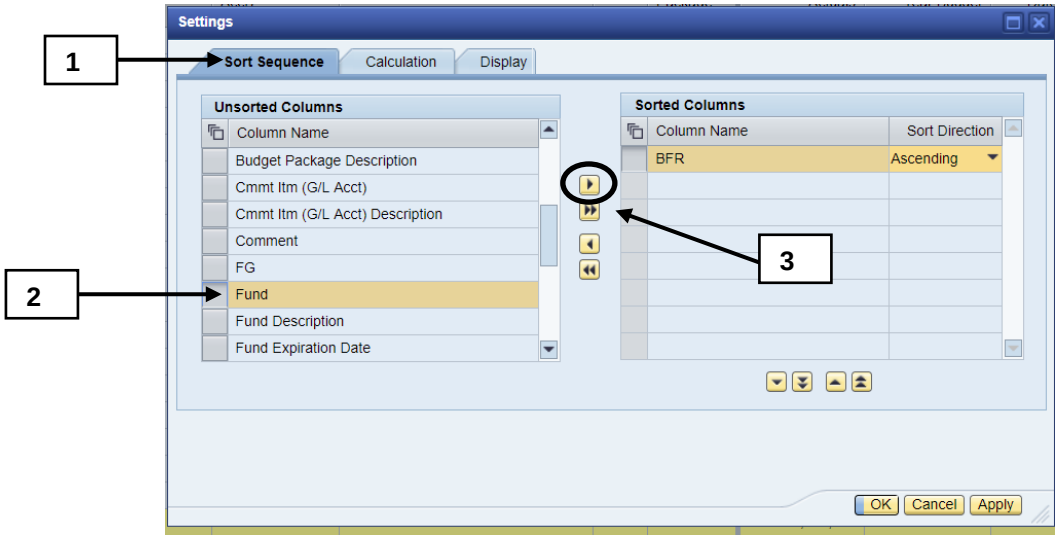


4. Click **Apply** to see the change in the grayed out view of the layout.
5. Click **OK** to remove the sort and review the results with the sorting and subtotaling removed from the layout.
6. Review the layout with sorting and subtotaling removed.

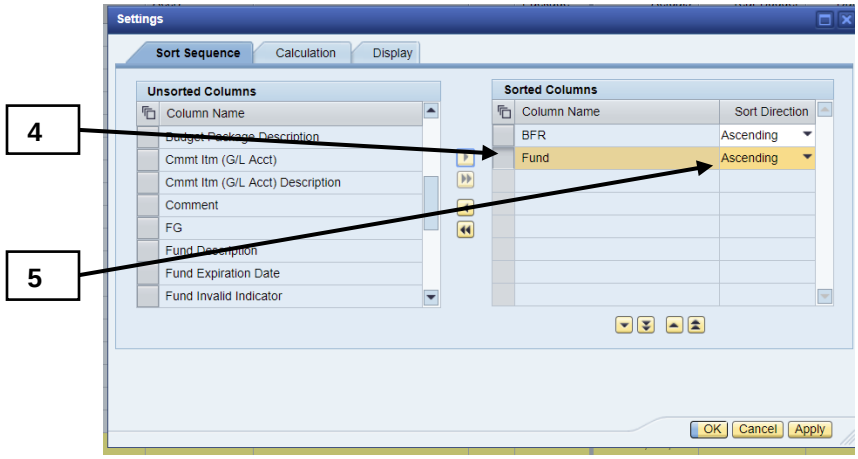
Customizing the Display (cont.)

Add Multiple Sort / Subtotal Selections

On the Sort Sequence tab in the *Settings* box:

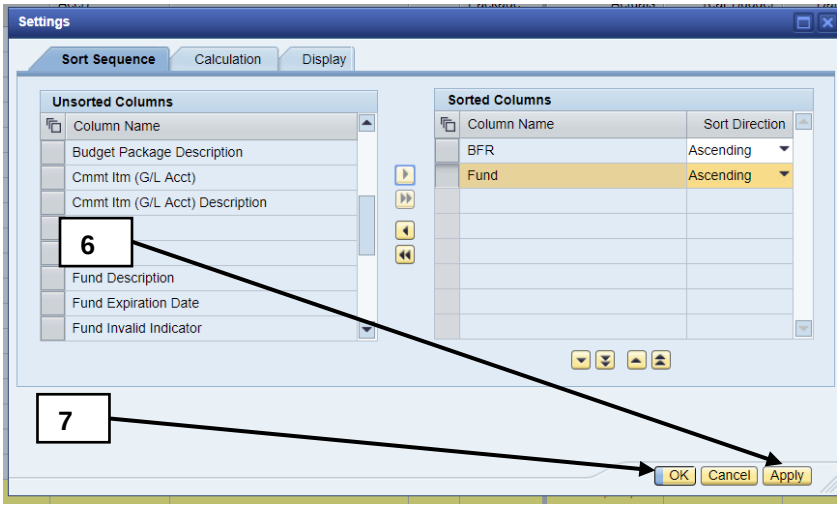


1. Click on the **Sort Sequence** tab.
2. Click on the box to select and highlight one or more columns listed under *Unsorted Columns* (left side) that need to be included in the sort sequence of the layout.
3. Click on the **Add Item** button.



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.

Customizing the Display (cont.)



6. Click **Apply** to see the change in the grayed out view of the layout.

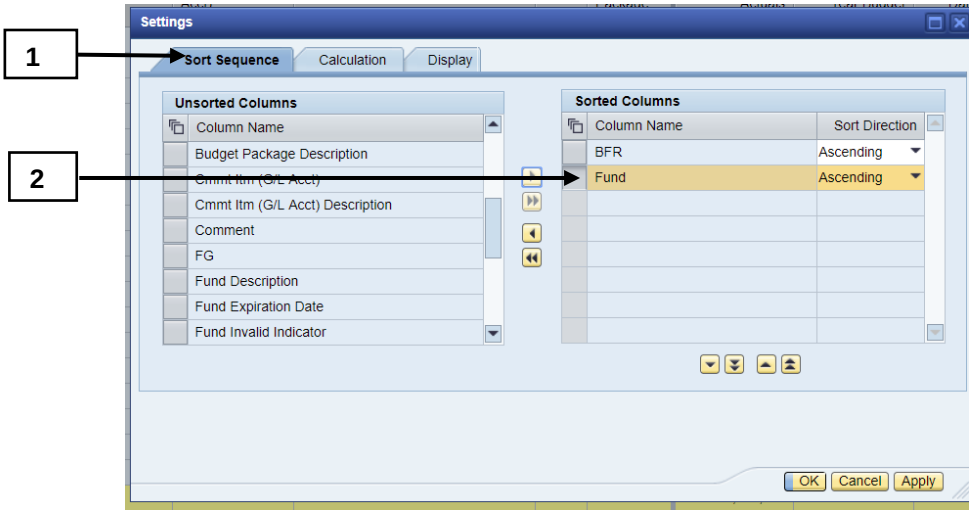
7. Click the **OK** button to add the sorting and subtotaling for the selected values.

8. Review the sorting changes made to the layout.

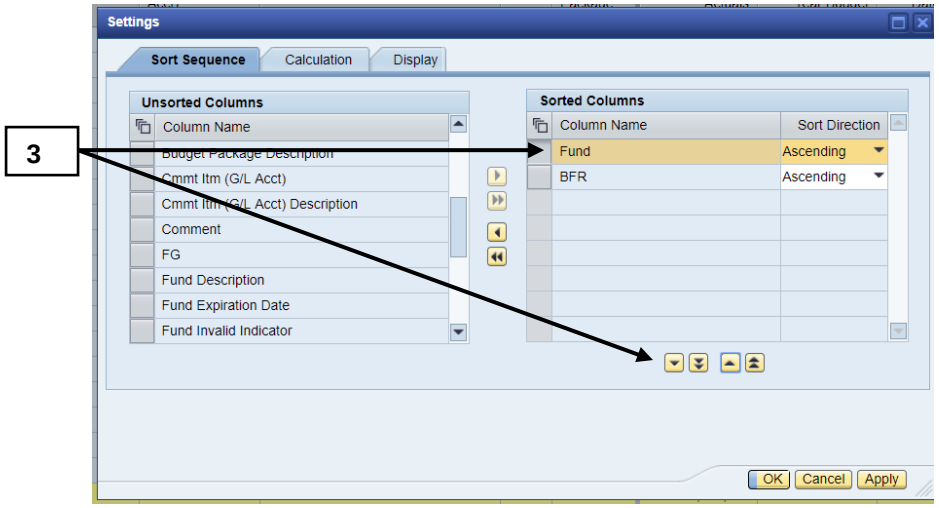
Customizing the Display (cont.)

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

On the Sort Sequence tab in the *Settings* box:

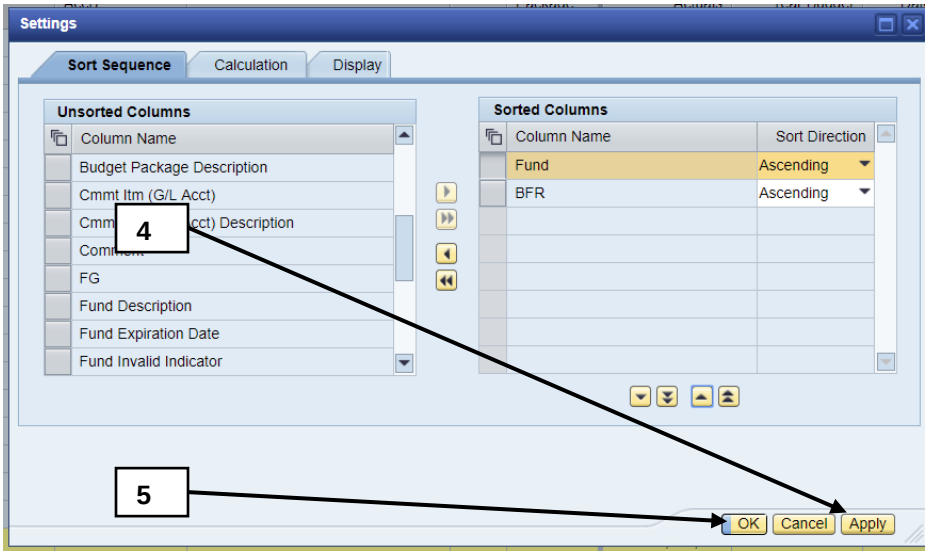


1. Click on the **Sort Sequence** tab.
2. If more than one column is displayed under *Sorted Columns,* click on the box to select the column name that needs to be moved in the sort order (from a secondary to primary sort in this example).



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).

Customizing the Display (cont.)



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

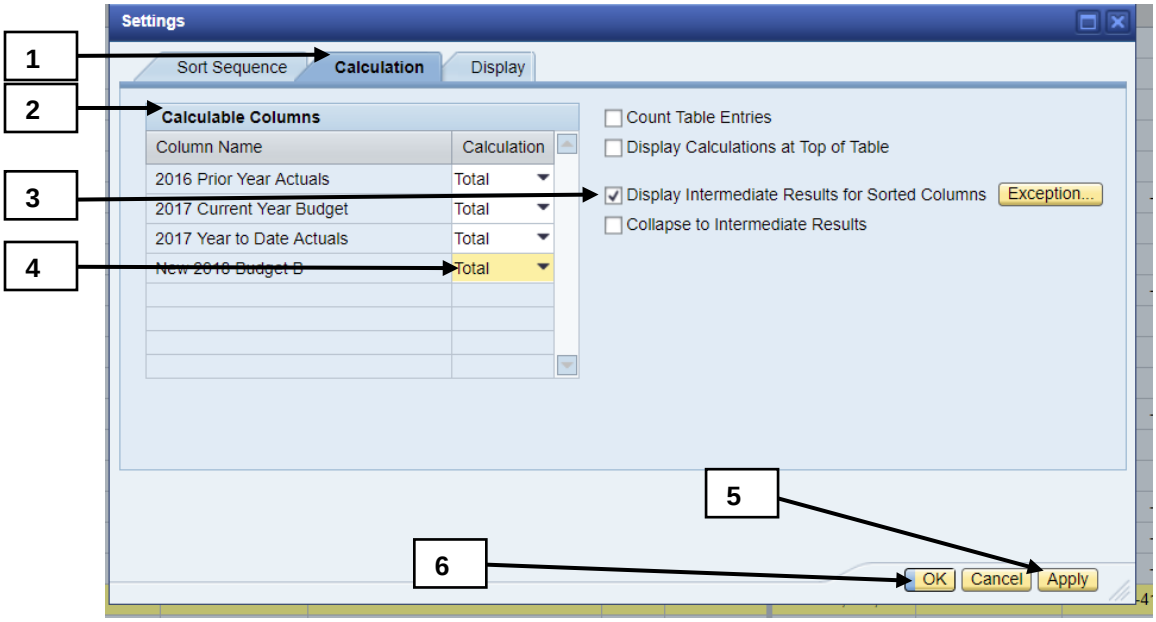
5. Click **OK** to display the sort order changes in the layout.

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.

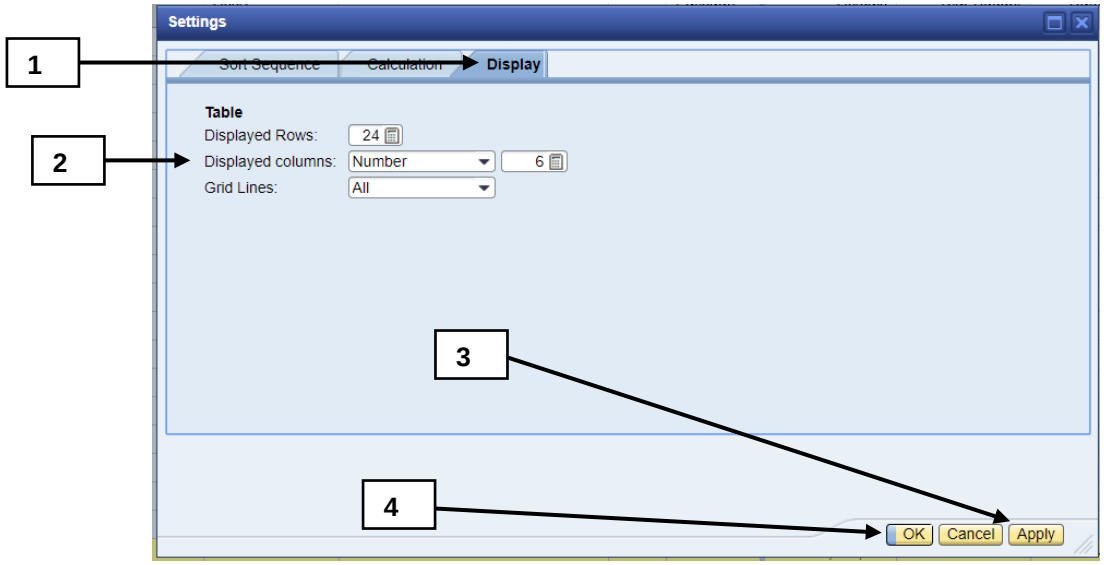
5. Click **Apply** to see the changes in the grayed out view of the layout.

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.