

# Fast•Class File

SmartOffice

## Volume 48: Summary Screen Customization

### To Add a Column to the Summary Spreadsheet -

- Click the **Customize Spreadsheet Layout** button in the summary screen toolbar.



Figure 1: The Customize Spreadsheet Layout button.

Note: When the cursor is placed over the **Customize Spreadsheet Layout** button, the **Change Sorting** box will appear. This box will allow you to change the sorting and grouping of data in columns already on display in the summary screen. The **Change Sorting** box will not allow you to make any changes to columns selected for display in the summary screen.

- SmartOffice will open the **Spreadsheet Customization** screen.

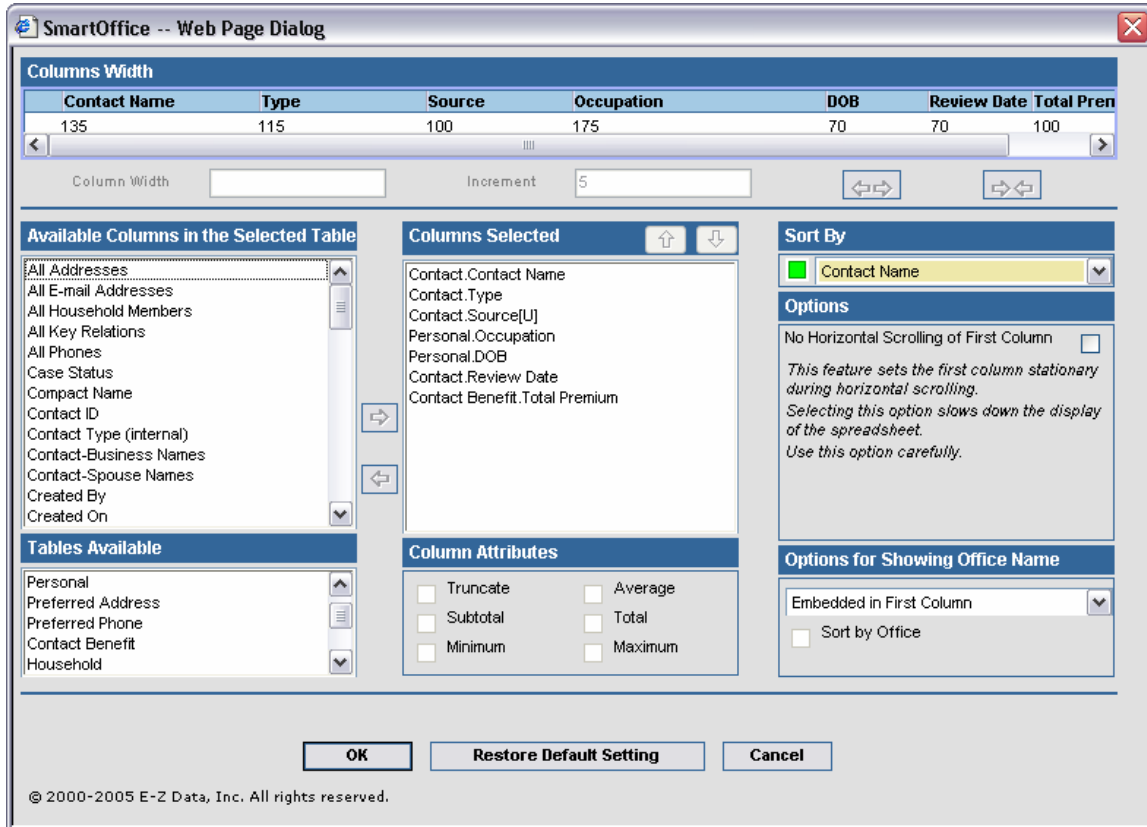
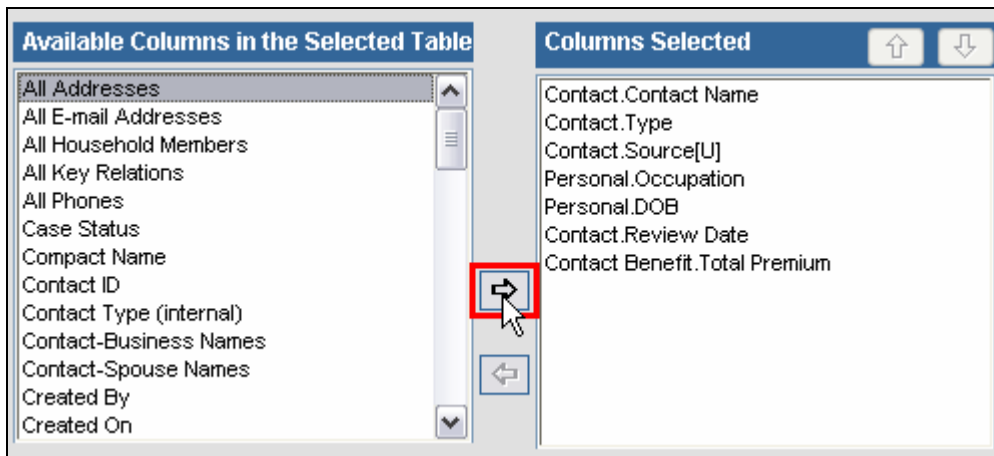


Figure 2: The Spreadsheet Customization screen.

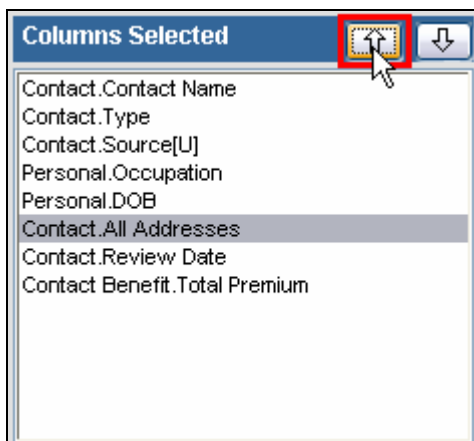
- Select the table with the column to be added to the summary screen in the **Tables Available** section in the bottom left hand corner of the **Spreadsheet Customization** screen.
- Table selection will determine column selection in the **Available Columns in the Selected Table** section.
- Select the desired column with a left-click.
- Columns can be moved into the **Columns Selected** section in the middle of the **Spreadsheet Customization** screen in two ways –
  - After a column is selected, click on the arrow button pointing out of the **Columns Available** section and into the **Columns Selected** section.
  - Double-click the selected column in the **Columns Available** section.



**Figure 3: Moving the All Addresses column into the Columns Selected section using the arrow button.**

### To Change the Location of a Column in the Summary Spreadsheet -

- With the **Spreadsheet Customization** screen open, select the column to be moved in the **Columns Selected** section with a left-click.
- Move the column in the spreadsheet using the **Up** and **Down** arrows.



**Figure 4: Moving the All Addresses column with the Up arrow.**

## To Adjust the Default Width of a Column -

- With the **Spreadsheet Customization** screen open, select the column to be adjusted in the **Columns Width** section at the top of the **Spreadsheet Customization** screen.
- The width of a column can be adjusted in two ways –
  - Enter the desired width in the **Column Width** field.
  - Use the **Expand** and **Contract** buttons in the **Columns Width** section.

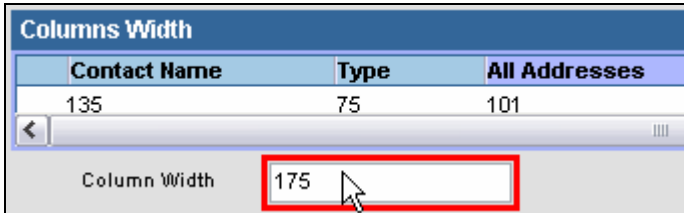


Figure 5: Adjusting the width of the All Addresses column using the Column Width field.

## To Move Columns Out of a Summary Screen –

- With the **Spreadsheet Customization** screen open, select the column to be removed from the spreadsheet in the **Columns Selected** section with a left-click.
- Columns can be removed from the **Columns Selected** section in the middle of the **Spreadsheet Customization** screen in two ways –
  - After a column is selected, click on the arrow button pointing out of the **Columns Selected** section and into the **Columns Available** section.
  - Double-click the selected column in the **Columns Selected** section.

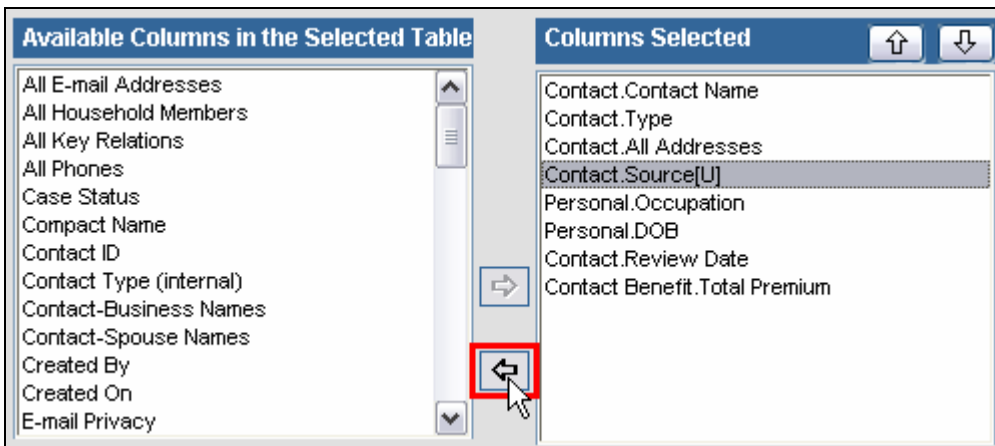


Figure 6: Removing the Source column from the summary spreadsheet using the arrow button.

## Saving Spreadsheet Customizations –

- When customizations are completed in **Spreadsheet Customization** screen, click **OK**.

*Note: To return to original default spreadsheet layout, click **Restore Default Settings**.*

- Based on security rights for your user ID, you may be able to change summary screen layout for multiple users. If you have rights to make global spreadsheet customizations, SmartOffice will open the **Options for Saving** screen.

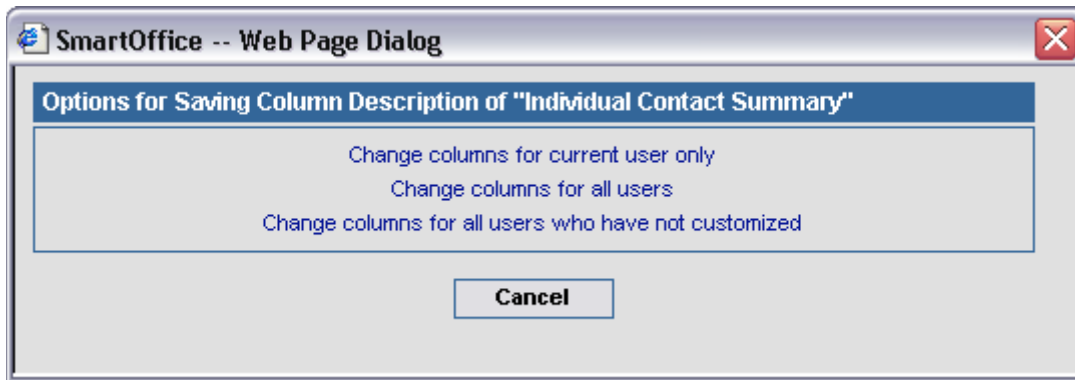


Figure 7: The summary spreadsheet options for saving screen.

- Select the appropriate hypertext link -
  - **Change columns for current user only:** Only the summary for the logged in user making the changes will be customized.
  - **Change columns for all users:** Summary screen customizations will affect all SmartOffice users.
  - **Change columns for all users who have not customized:** All users with default summary spreadsheet layout will be affected by summary customization.