Column Manager

Managing Column Reports

The Column Manager is available from most Search Result pages or wherever there is a list, like in the Client and CMA Managers. It allows you to apply a different Column report layout to your search results. There are two types of column reports:

- **System** — System reports are pre-defined and come loaded with the program. They cannot be modified directly; you must first make a copy, then modify and rename the copy.
- **Personal** — Personal reports are created by you and, therefore, can be edited and deleted by you.

▶ ↓To apply a different column report layout:

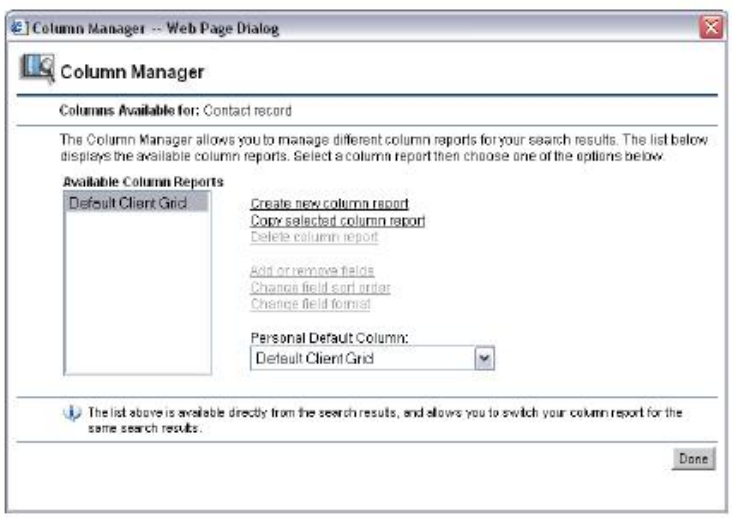
- From the Client Manager or a Search Results page, click the **Columns** drop-down list and select the name of a report.

The Search Results are displayed in the new column layout.

▶ ↓To access the Column Manager:

- From the Client Manager or a Search Results page, click the [ ] icon adjacent to the **Columns** drop-down list at the top of the page.

The Column Manager pop-up window opens:



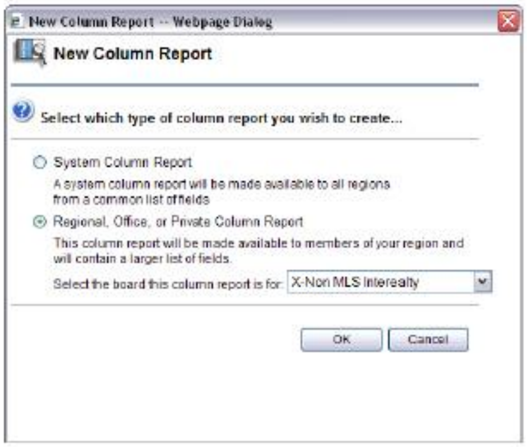
Creating a New Column Report

MLXchange allows you to create custom column layouts (or "list views") for the Search Results list that will let you present your data any way you want.
The Column Manager feature is particularly useful for preparing custom export formats and column reports for search results.

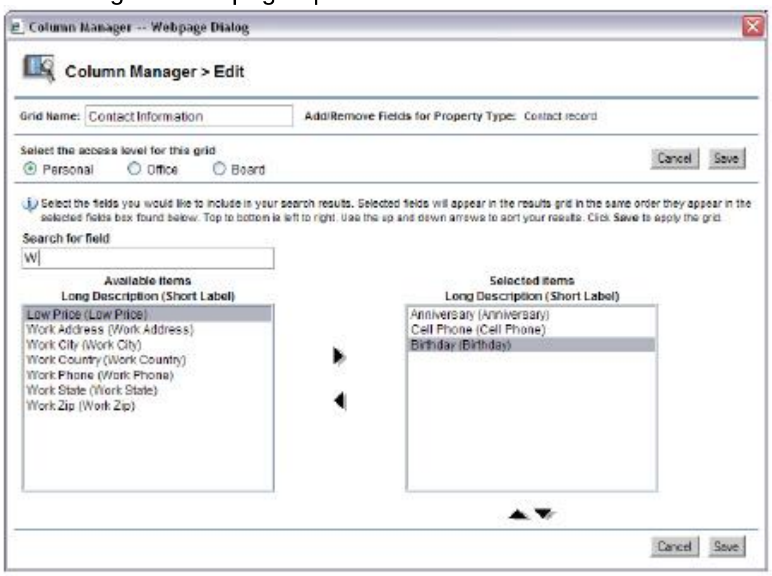
Column Manager

1. From the Column Manager pop-up window, click **Create new column report**.

   The New Column Report dialog box opens.



2. Select the option button for type of column report you want to create:
   - **System Column Report**
   - **Regional, Office or Private Column Report**
3. Click **OK**. The Column Manager > Edit page opens.



4. Type a name for the new column report in the **Grid Name** field.
5. Select the access level option:
   - **Personal** — available only to you.
   - **Office** — available to all agents in your office, as read-only.
6. Build the column layout by selecting the field(s) you want from the **Available items Long Description (Short Label)** list.
   - enter the first few letters of what you want to search for in the **Search for field** text box. The list shortens to display the matching items.
   - highlight a field in the list, then click the right [ ] arrow to add it to the **Selected items** list. Hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.

- to remove a field, highlight it in the **Selected items** list, then click the left [◀] arrow to move it back to the **Available items** list.
- to change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [▲] or down [▼] arrow to move it to a new position.

Note: The top field in the list will appear as the far left column in the grid; the bottom field in the list will appear as the far right column.

7. Click **Save**.

The new column report name appears in the **Available Column Reports** list on the Column Manager pop-up window. The remaining links become available.

Copying a Selected Column Report

1. Highlight a report in the **Available Column Reports** list.
2. Click the **Copy selected column report** link.

The Copy Column Report dialog box opens.

3. Select the option button for type of column report you want to create, Personal or Office.
4. Click **OK** and the Column Manager > Edit pop-up window opens.

NOTE! *The **Grid Name** field shows the name "Copy of [column report name]".*

5. Type a name (or accept 'Copy of') for the new column report in the **Grid Name** field.
6. Build the column layout by selecting the field(s) you want from the **Available items** list.
   - enter the first few letters of what you want to search for in the **Search for field** text box. The list shortens to display the matching items.
   - highlight a field in the list, then click the right [▶] arrow to add it to the **Selected items** list. Hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.
   - to remove a field, highlight it in the **Selected items** list, then click the left [◀] arrow to move it back to the **Available items** list.
   - to change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [▲] or down [▼] arrow to move it to a new position.
7. Click **Save**.

The modified report appears in the **Available Column Reports** list on the Column Manager pop-up window. The remaining links become available.

8. To further customize the report, click the **Add or remove fields**, **Change field sort order** or **Change field format** links.

Editing an Existing Column Report

The Column Manager lets you quickly modify your own (Personal) Column report layouts. You can add or remove fields, change the field sort order on Search Results pages or change a field format.

▶ ↓To add or remove fields from a selected Column report:

1. Highlight a Personal Column report in the **Available Column Reports** list.

2. Click the **Add or remove fields** link.

   The Modify Column Report dialog box opens.

3. Select the option button for type of column report you want to create:
   - **System Column Report**
   - **Regional, Office or Private Column Report**

4. Click **OK** and the Column Manager > Edit pop-up window opens.

5. To add a field, highlight it in the **Available items** list, then click the right [ ] arrow to add it to the **Selected items** list.
   - use the **Search for field** to help you locate the field you want to add.
   - hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.

6. To remove a field, highlight it in the **Selected items** list, then click the left [ ] arrow to move it back to the **Available items** list.
   - hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.

7. To change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [ ] or down [ ] arrow to move it to a new position.

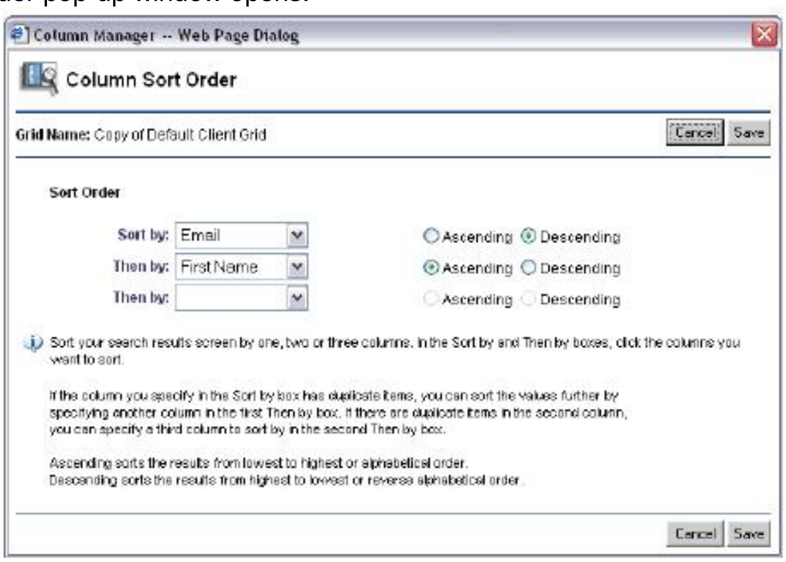
   Note: The top field in the list will appear as the far left column in the grid; the bottom field in the list will appear as the far right column.

8. Click **Save**.

↓To change the field sort order in a selected Column report:

1. Highlight a Personal Column report in the **Available Column Reports** list.
2. Click the **Change field sort order** link.

   The Column Sort Order pop-up window opens.



3. Click the **Sort by** drop-down list and select one of the column fields by which you want to sort.
4. Click either the **Ascending** or **Descending** option button to the right of the drop-down list.

   *Note: If the column (selected in the **Sort by** list) results in duplicate values, you can sort the values further by using the **Then by** lists.*

5. Click the first **Then by** drop-down list and specify another column name.
6. Click either the **Ascending** or **Descending** option button.
7. If needed, specify another column name in the second **Then by** drop-down list.
8. Click either the **Ascending** or **Descending** option button.
9. Click **Save**.

   A message box appears confirming your changes.
10. Click **Save**.

Sort Order Example:

Here is an example of what a list would look like if it were sorted first by **Status**, then by **Area**, and then by **List Price** (all ascending):

Status	Area	List Price
Active	100	$100,000
Active	100	$200,000
Active	200	$100,000
Active	200	$200,000
Closed	100	$100,000
Closed	100	$200,000
Closed	200	$100,000
Closed	200	$200,000

↓To change the field format:

1. Highlight a Personal Column report in the **Available Column Reports** list.
2. Click the **Change field format** link.

   The Customize Columns pop-up window opens.

3. Highlight the name of the column header you want to customize in the **Columns** list.
   - use the up [ ] or down [ ] arrows to change the column order in the list.
4. Change the selected column's settings:
   - **Column Header** — type the text of the column's header labels you want to appear.

- **Prefix**/**Suffix** — type some pre-defined text you want to appear before or after the field value within a column. For example, you may want the **Square Footage** column to always display "Sq Ft" after the value.
- **Alignment** — specify the column's field values to line up to the **Left**, **Right**, or **Center**.
- **Field Mask** — click the drop-down list and choose a pre-defined formatting option to apply to the selected column. This setting is only available for numeric fields and lets you control how the value is presented. For example, you can determine how many decimal places to show, if you want to use comma separators, etc.
- **Display Format** — click the drop-down list and choose a display format for the selected column. This is applicable to the fields that have two ways of displaying data; such as **Short Code** or **Long Description**.
- **Use this Display Format for all fields in this grid** — select this link to apply the same format to all columns.

> ***NOTE!*** *Unless you are preparing a column layout for printing customer reports, the Short Code is usually the best option because it lets you display more columns of information on-screen.*

5. Specify the **Column Width** expressed as a number of characters.
6. Select the **Best fit all columns** check box if you want the program to automatically optimize the column fit for the page. This means that all of the columns dynamically resize so that they accommodate, but are not wider than, the maximum width of their contents.

> ***NOTE!*** *Clear the **Best fit all columns** check box to turn off this feature.*

7. Click **Save** and a message box appears, confirming your changes.
8. Click **OK**.

Deleting a Column Report

You can delete Personal Column reports only. System reports or Office/Board reports for which you do not have administration rights, cannot be removed.

1. Highlight a Personal Column report in the **Available Column Reports** list.
2. Click **Delete column report**.

   A message box appears prompting you to confirm the deletion.
3. Click **OK**.

Setting a Personal Default Column Report

You can specify the name of a Column report to be applied automatically (by default) to your Search Results lists.

1. From the Column Manager pop-up window, click the **Personal Default Column** drop-down list and select the name of a report you want assigned as the default.

   Your Search results are displayed in the Column report layout specified.
2. Click **Done**.