Matrix Creating a Custom Display

CREATING A CUSTOM DISPLAY

There are now two ways to set up a Custom Display in Matrix.

Creating a Custom Display from the Agent 1 Line

When viewing results from an Agent 1 Line display (the default display), you can change the order, the column width, the fields included or excluded. It is convenient and simple to do!

1. To change the size of a Column, hover to the right side of the Column name. A double bar with arrows on each side will appear. To change the width of the column, click on the arrow and holding the left key, drag to the position you want and release the key when done.

2. To adjust Column Alignment , hover over the column title slightly above the column name. An "Anchor" type symbol will appear. When the "Anchor" appears click on your left key and a box will appear. Select a position under the word Alignment and click on Apply when done.
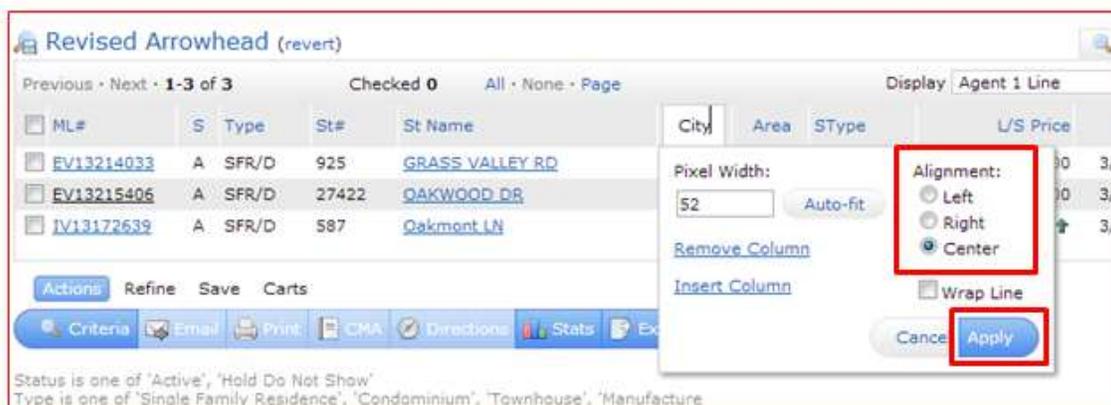
3. To move the location of an entire column hover over the column name, when the "Anchor" appears hold the left key and drag the column into the position you want. Release when done. This works best when you are hovering over the top area of the column.

4. To remove columns or to add columns to a display, hover and click. A box will appear that will give you the options to Remove Column or Insert Column (when inserting a column the column will appear to the right of the column you have clicked on). See item 2 above for screen view.

      a) To Insert Column click on the option to insert. A field that will allow you to choose the fields you want to add will appear, you can scroll and click the list or along the bottom you will see the word Search, begin to enter a field name and your choices will condense. Click on the choice and then click Apply.

      b) To Remove Column, click on the option to Remove and the column will be removed.

5. To save a "Custom Display", click on the Icon to the right of the Per Page –
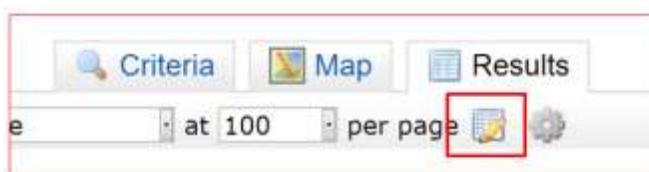
Click in the field that reads "Agent 1 Line", back space and then enter the name of your new custom display. After you have named it, click on the option to "Save as a Copy". Your new custom display will now be saved! You can now view any results list using your custom display by clicking on that option in the Display field.

NOTE: When you have set up a "Custom Display" from a specific search following the aforementioned instructions, the display for that search will appear in your custom format. To return the search results display to another display or back to the Agent 1 Line you need to click on Revert unsaved changes. This will allow you to look at your search results in any format.

Building a Custom Display from the Custom Display Screen

The second option for a custom display is to use the Custom Display Screen option in My Matrix.

1. From the Matrix home page click on the My Matrix tab.
2. Scroll down and click on Settings.
3. Click on "Custom Display".
4. You can select a property or agent type Display.
5. Click Add to begin building your custom Display.

6. When you click on Add follow the steps listed below:

a) Enter the name you want to give the display.

b) Begin to select the fields you want to add to the display – you can scroll the field or start entering a field name in the Search field – click on the field and then click Add, when the field is added it will appear in the Selected Columns area. To remove a field you would highlight and click on Remove.

c) To arrange the order from left to right that you want your fields to appear in, click or highlight the field you want to move in the Selected Columns area and click the Up or Down buttons.

d) When done, click on "Save" and then click on "Done".

7. To edit a custom display you may do so in one of the following ways:

a) From the results view you can insert, remove, resize or re-locate columns just as you would if you were building a Custom Display from the results page. Click on the display you want to edit, make your changes and then click on the Manage Display icon to the right of the words "per page" and click "Save Changes". This will update your display to incorporate the changes you have made to the display.

b) From the My Matrix, Settings, Custom Display window you can Edit a display by clicking on the name of the display you want to change, clicking on "Edit" and then removing, inserting, resizing or relocating. To do this you click on the items you want changed from the Selected Columns area and then click remove, or click the Up or Down boxes to relocate or to re-center or change column width go to the Custom Column Properties and make changes. Remember to click Save and Done from this action area!

8. To delete a custom display you can do so from the Manage Display icon or from the My Matrix, Settings, Custom Display area.

9. To set a particular view as your opening default, click the "Gear" Icon located on the far right under the "Results" tab. Then click on the option the reads "Set Current Display, Sort Order and Count per page as Search starting display".

Remember that at any time when viewing your Results list you can change the format of the display by clicking on the Display field drop down arrow and then clicking on the view you want. Even if you have saved a certain view as the opening default, you can change the view at any time.