



eScripture One InVision Custom Columns

User Guide

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Customizable Columns Features

This article explains how to use the customizable columns feature in InVision. These options allow more flexibility in generating reports exactly the way you want them.

The main features of customizable columns include:

- Choosing which columns are included and in what order.
- Choosing sorting and grouping.
- Choosing how columns are summarized.

Traditional Sorting and Grouping

When accessing a report that utilizes custom columns, note that the “Sorting and Grouping” options have been moved. These options are now located in the “Sorting, Grouping, and Layout” section:

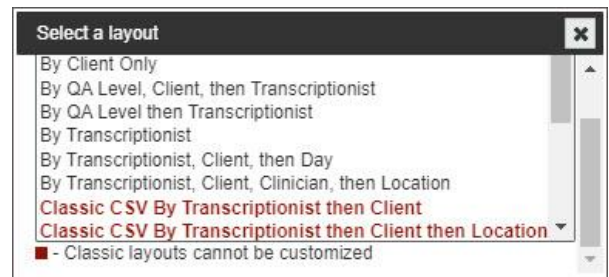
+ Sorting, Grouping, and Layout This section is collapsed by default.

Expand this selection to see all the sorting and grouping options available, including the Predefined Layouts button:

predefined layouts Click on this button to view the traditional sorting and grouping options that were available before custom columns were introduced.

Note: For some reports, when saving as CSV, the custom column version will vary from the traditional CSV version. If you would like to retain the original CSV layout, these are in **RED** at the bottom of the list and begin with the words, “**Classic CSV**”.

To use traditional sorting and grouping, click on the option you want, then click the “Load” button. To close the window, use the “Cancel” or “X” buttons.




Tip - You can load a traditional sorting and grouping method and then use further customization to make the report tailored to your specific needs.

Choosing Included Columns and Order

The new customizable columns allow you to add or remove columns from the report of your choosing. This can be beneficial to reduce unneeded columns or to add or reposition a required piece of information.

Add a Column

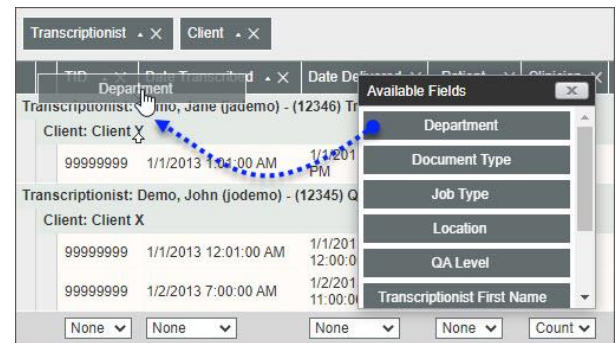
To add a column, click on the Available Fields button.

 **available fields** The Available Fields pop-up window appears. To close the window, use the “X” button on the Available Fields popup.

Drag and drop the field(s) from this window into the location you would like it to appear on the report. A white arrow will appear to indicate where the new field will be inserted.

All fields that can be added to this report (and are not already included within the report) will appear in the Available Fields pop-up window.

The picture to the right shows the Department column being added to the report.



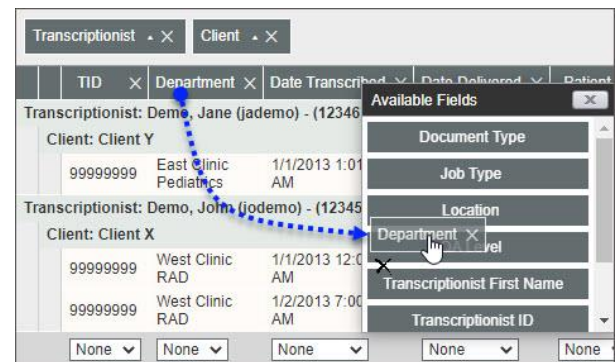
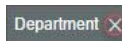
Remove a Column

To remove a column from your report, you can either:

- Drag and drop the column from the report back into the Available Fields pop-up.

The picture to the right shows the Department column being removed from report.

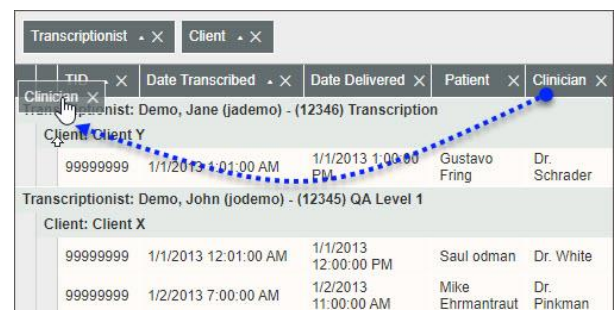
- Or, click the “X” button that appears to the right of each field’s title.



Move a Column

To move a column, drag and drop it from its current position to the new position.

The picture to the right shows the Clinician column being moved from the right side of the report to the far left.



Choosing sorting and grouping

The new customizable columns options allow you to sort and group data based on whichever column(s) you choose. This can be beneficial if you need your data summarized based on a certain piece of information or data type.

Adding a New Grouping

To add a new grouping to your report, click and drag a column from the report into the grouping area above the main column area.

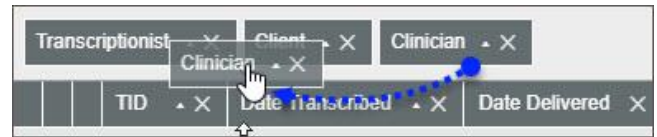
The picture to the right shows the Clinician Column being added to grouping.



Changing the Order of Grouping

Grouping fields can be dragged and dropped (similar to column fields) to change the order of the grouping.

The picture to the right shows the Clinician column being moved so that it is the first field grouped on.



Removing a Grouping

Groupings can be removed in one of two ways:

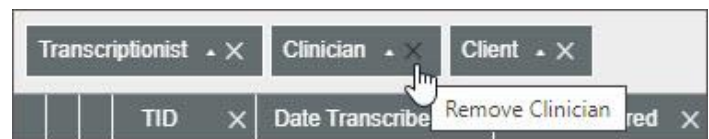
- Drag the field from the grouping area back into the report's columns.

The picture to the right shows the Clinician column being removed from grouping and added back into the report's columns.



- Or, either click the "X" button to the right of the column or drag it back into the Available Fields window if you do not want the field in the report.

The picture to the right shows the user clicking the "X" button to remove the Clinician grouping and the field from the report.



Changing the Sorting

To sort by an individual column or grouping, click on the column name. Clicking a column a second time changes the order of the grouping:

TID - An arrow pointing UP is A-Z order or ascending numerical order (123)

TID - An arrow pointing DOWN is Z-A order or descending numerical order (321).

Each grouping can be sorted individually as ascending or descending. The grouping order itself is based on what order the columns are added. Items to the left are grouped first.

Clicking on a column within the report will sort by that column.

If you would like to sort by multiple columns, use Shift+left-click to click each column that should be added to the sorting.



The image above shows multi-column sorting.

Note: There is no indication of what order the columns are sorted. The order is determined by which order you clicked the column headers.

You can remove the multi-column sorting by doing a single left-click on one of the columns. This will remove all the sorting that had been applied, and instead sort by the column you last clicked.