Tip 029: Formatting and Customizing Columns

Primary Audience: Information Workers

Purpose: You can set column preferences based on your business needs, your EDRMS Content Manager role, and the tasks you are performing in EDRMS Content Manager.

Certain attributes are especially useful for particular tasks. For example:

- Home, Location and Assignee are useful when doing inventories.
- Date Due for Semi Active, Date Due for Destruction, Date Due for Archive (SR), and Date Due for Archive (FR) are required when culling records.

The following columns can be useful in the boxing and disposition process:

- Container (Folder/Box)
- Series Record allows you to check the OPR
- Disposition
- Retention Schedule
- Date Created
- Content Start Date
- Content End Date
- Closed Date
- SO Date is a good way to check that SO dates are entered and are correct
- Date Due for Destruction
- Date Due for Archive (SR)
- Date Due for Archive (FR)

Sorting columns is useful for grouping various records in a search results list. For example:

- Sorting by Assignee will group records signed out to certain individuals.
- Sorting by Date Due for Destruction will group records by their destruction date.
To set column preferences:

1. From the View tab, select Format Columns (you can also right click anywhere in the column header). The Column Preferences popup is displayed. The Available Columns window displays the columns that you can add to your list pane. You can also display the Column Preferences popup by right clicking anywhere in the column header and selecting Format Columns.

2. To add a column, select it from the Available Columns list and click Add. The Displayed Columns popup shows the columns that are displayed in your list pane. You can click Up and Down to change the order of display of the columns.

3. To remove a column, select it from the Displayed Columns list and click Remove.

4. Click OK.

You can also sort search results by clicking on a column header. See Tip 030: Sorting Columns.

Note: The display of a search result may be slower if you have a large number of columns. To speed up your search, add columns after the search is complete.