

User layouts

September 10, 2026

User layouts

User layouts at a glance

User layouts are saved presentations of a list: they determine which columns you see and how the list is displayed. The User layouts list is part of the configuration area.

If you need to...	Go to
Find the list	Find the User layouts list
Read fields and display controls	Understand the list and its fields
Maintain a layout	Choose and maintain a layout
Adjust display or export	Adjust the display and export the list
Handle an unavailable action or message	Handle unavailable actions and messages
Continue from a selected layout	What to do next
Return to the configuration layout area	Default layouts
Edit a saved layout in detail	Edit user layout
Personalize other list workspaces	Personalizing your workspace

When you know which controls you need, review the conditions before opening the list.

Before you start

The list and its controls depend on the selected layout and the display settings available to you.

Before you start	What to expect
The list area is available	The list appears only when a selected layout is present.
The list has loaded	The right-side action controls appear with the list.

Before you start	What to expect
Table-layout controls are available	Table Layout and its choices appear only when table-layout access is available.
Export is available	Export requires the export feature and remains disabled when export is unavailable.
A row is editable	Its edit link appears in the row.
Display settings are configured	Filter Row and Group Panel appear only when their corresponding settings are available.

With these conditions in place, find the list in the configuration navigation.

Find the User layouts list

From this list, review a saved presentation before opening it for detailed editing.

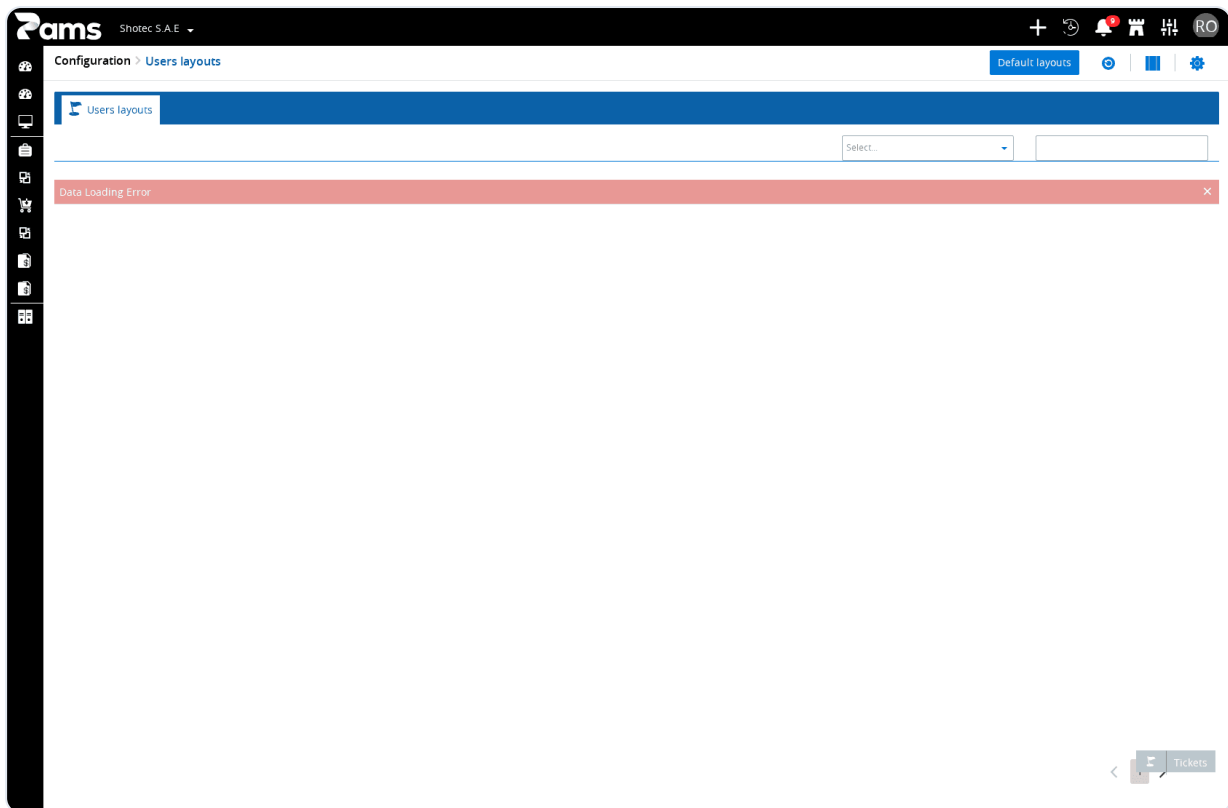
Prerequisites

- You can open the configuration route.

Steps

1. In the configuration navigation, select **Users layouts**.
2. Confirm that the **Users layouts** tab is selected.
3. Select **Filter by:** to open the filter area.

The list includes a status selection and a username text field when the selected layout is present.



Result: The **Users layouts** list is on screen with its filter entry point.

With the list open, review its fields, columns, and display controls.

Understand the list and its fields

The User layouts screen combines filters, a data grid (the table of results), and display settings so you can work from the columns in the selected layout.

Field or choice	Type and rule	What it controls
Status selection	Select box; optional	Filters the list by status.
Username text field	Text box; optional	Filters the list by username.
Layout name	Text box; optional	Names a new layout.
Expand column width	Check box; optional	Toggles automatic column width.
Filter Row	Check box; optional	Shows or hides the grid filter row.
Group Panel	Check box; optional	Shows or hides the grid group panel.

Field or choice	Type and rule	What it controls
File input in the shared popup	File input; optional	Accepts an uploaded file when that shared surface is used.

The data grid uses the columns in the selected layout. Column names and their order therefore follow the layout currently in use. The grid supports paging, filtering, grouping, and sorting, remembers the list settings during the session, and uses a page size of 30.

The row filter and group panel appear when their corresponding display settings are available. The grid's **Columns Chooser** is disabled.

With the list structure clear, choose and maintain a layout.

Choose and maintain a layout

Use a layout when you want a saved column presentation for the User layouts list.

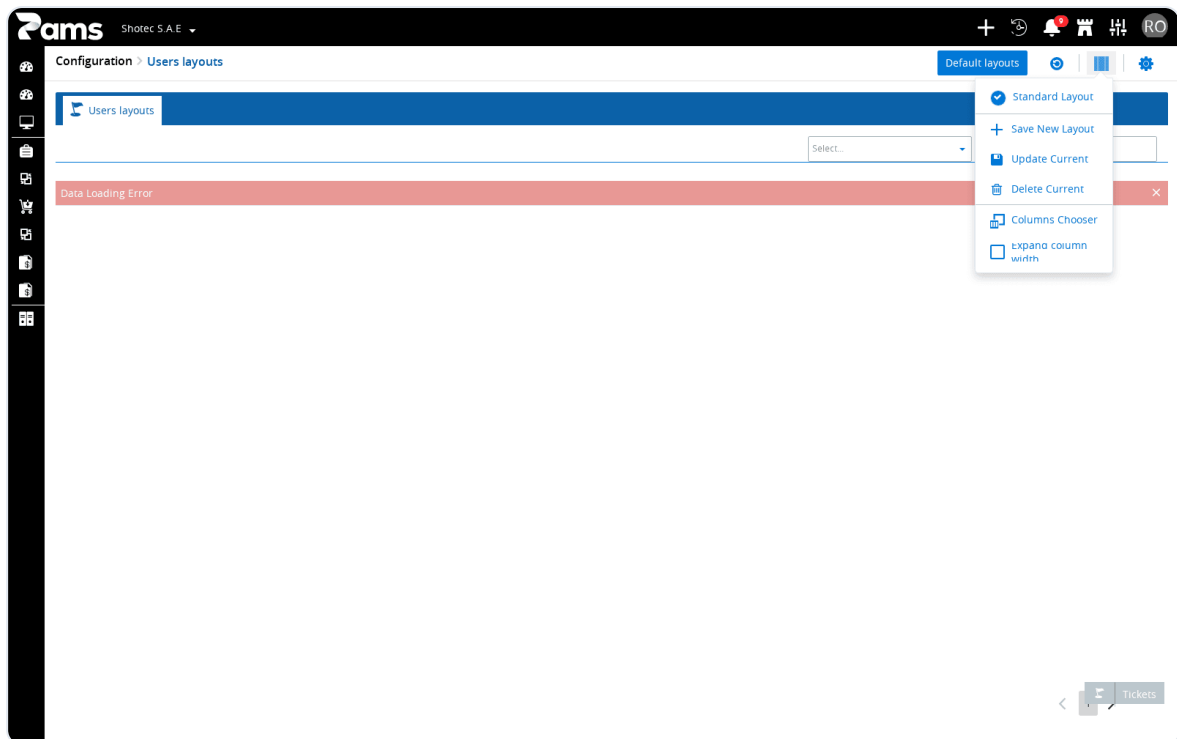
Prerequisites

- The selected layout and the **Table Layout** menu are available.

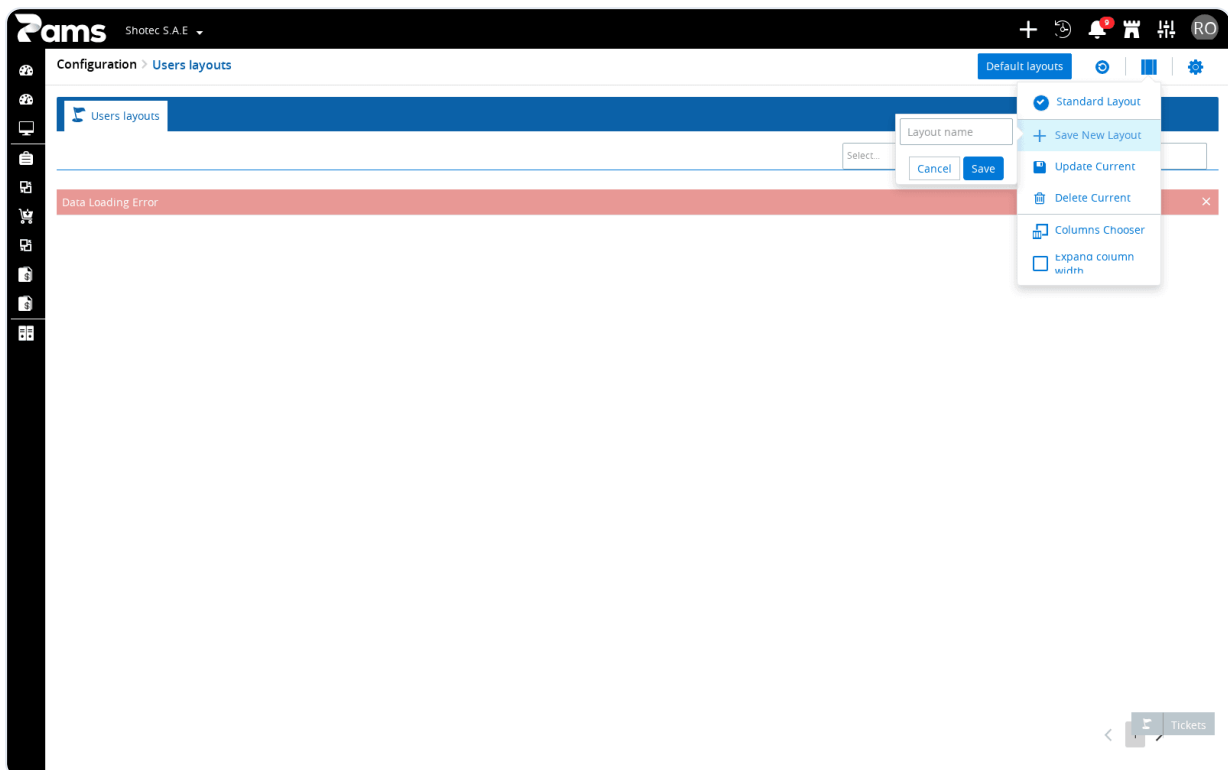
Steps

1. Select **Table Layout**.

If you need to...	Complete this step
Use an available saved presentation	Select the required layout choice.
Start a new presentation	Select Save New Layout .
Change the current presentation	Select Update Current .
Remove the current presentation	Select Delete Current .



Update Current and **Delete Current** are disabled for the standard layout.



If you selected Save New Layout

1. Enter the name in **Layout name**.
2. Select **Save**.

Result: The new layout is submitted from the layout menu.

If you selected Update Current

Result: The current layout is updated from the layout menu.

If you selected Delete Current

1. Review **Are you sure?**.
2. Select **Delete** to confirm the deletion.

Result: The deletion confirmation closes after the selected response.

If you opened the deletion confirmation but do not want to remove the layout

1. Select **Cancel**.

Result: The deletion confirmation closes without removing the layout.

Result: The selected layout remains active, or the layout maintenance surface closes after the selected action.

After choosing a layout, adjust the list display or open its export choices.

Adjust the display and export the list

Display settings change how the list is shown; export choices determine how the current list data is prepared for export.

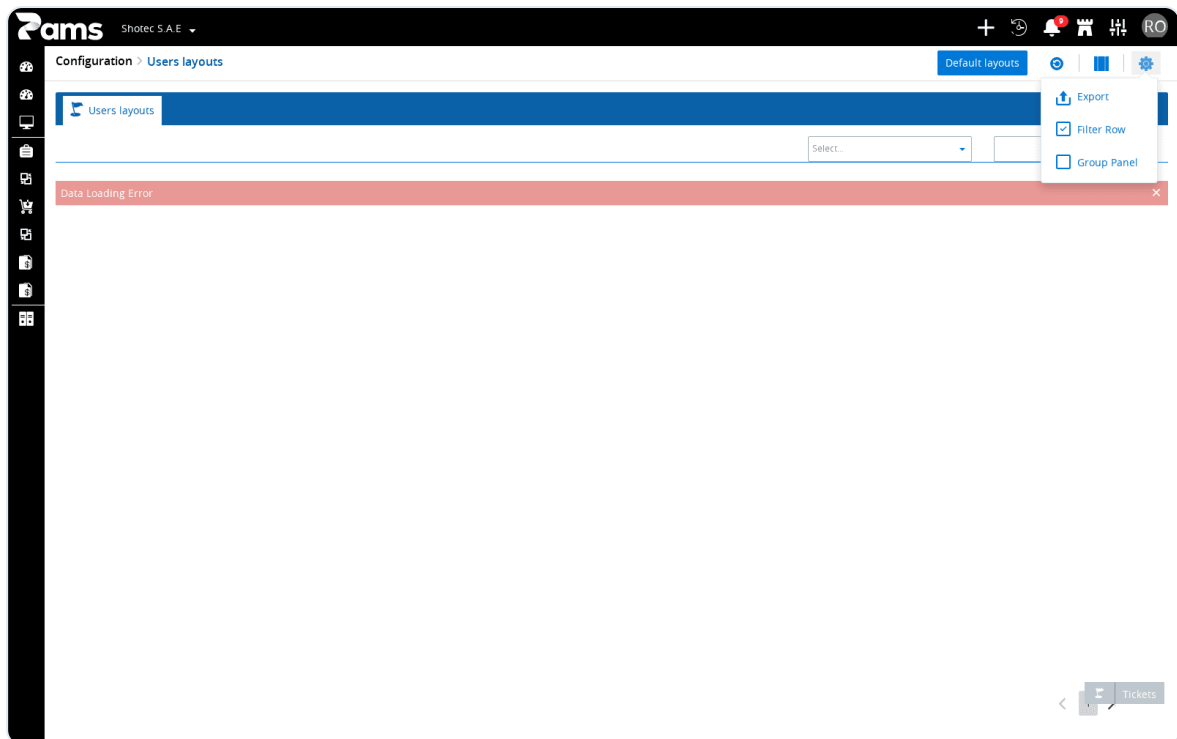
Prerequisites

- The User layouts list is open.
- The relevant settings are available.

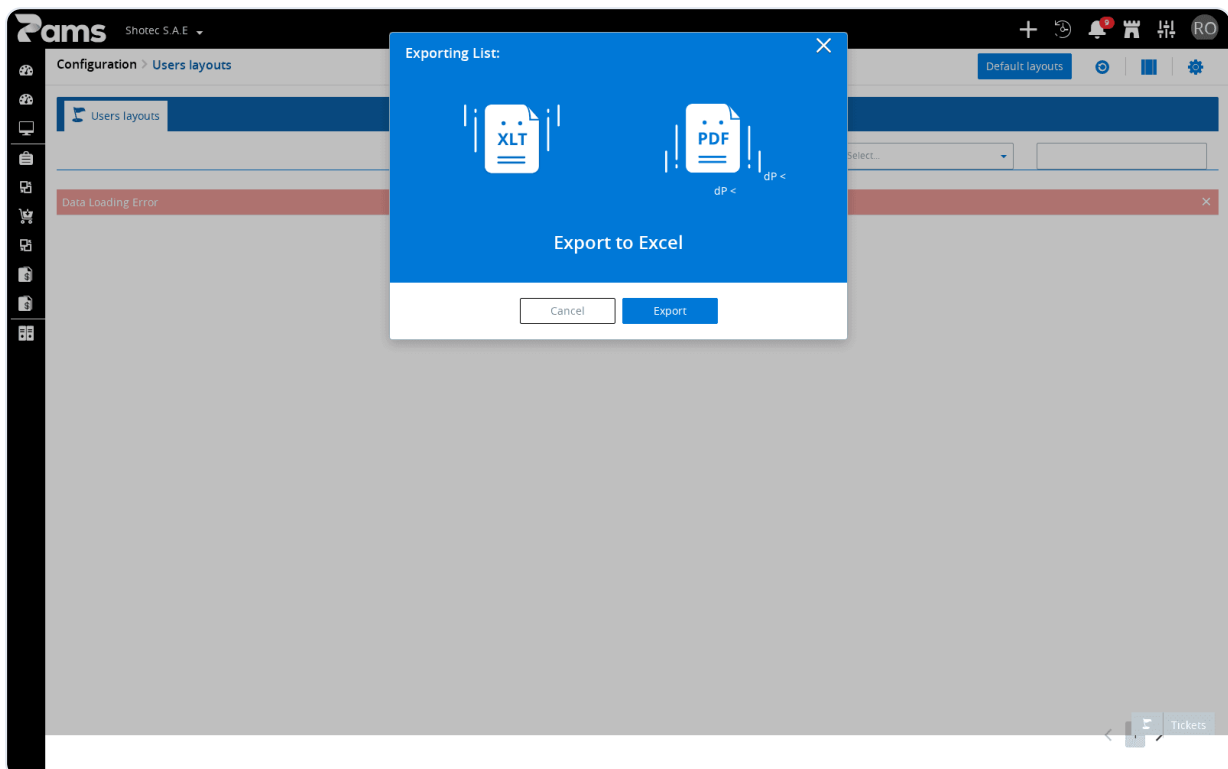
Steps

1. Select **Settings**.

If you need to...	Complete this step
Show or hide row filtering	Select Filter Row .
Show or hide grouping	Select Group Panel .
Start an export	Select Export .
Close export choices without exporting	Select Export .



The export surface starts with **Export to Excel** ; the other available choice is **Export to PDF** . When the data set is empty, the message **NO Data to Export** appears and the export does not start.



If you selected Filter Row

Result: The row-filter display changes.

If you selected Group Panel

Result: The group-panel display changes.

If you selected Export to start an export

1. Select an option in **Exporting List:**.
2. Select **Export** to start the export.

Result: The selected export format is submitted.

If you selected Export to close the choices

1. Select **Cancel**.

Result: The **Exporting List:** dialog closes without an export.

Result: The list display reflects the selected setting, or the **Exporting List:** dialog is closed without an export.

If a control is unavailable or a message appears, use the handling table before continuing.

Handle unavailable actions and messages

The controls available on this screen depend on the selected layout, display settings, and export availability.

What you see	What it means	What to do
No fixed set of data-column names	The selected layout determines which headers the list shows.	Read the headers in the selected layout.
No Import action in Settings	This list does not offer file import from Settings .	Use the available settings, or maintain a layout through Table Layout .
No create or delete controls appear in the list	Layout maintenance is available through Table Layout rather than the list.	Select Table Layout , then use Save New Layout or Delete Current when available.
Error loading accounts	Account information did not load for the lookup.	Wait until the account information is available, then continue.
NO Data to Export	The list has no data to send to the export dialog.	Use the status or username filters to locate data before exporting

What you see	What it means	What to do
		again.
Export is disabled	Export is not enabled for your configuration.	Review the list or change its display settings instead.
The list controls are absent after opening the configuration area	The page is not on the User layouts surface.	Select Users layouts from the configuration navigation.

The messages `Job Deleted Successfully` , `Job Ultimately Deleted` , `Server Error` , and `Data Importing completed` belong to other or inactive flows on this surface. They are not actions to use from the User layouts list.

When the list work is complete, continue to the selected layout record or return to Default layouts.

What to do next

An opened layout row takes you to the detailed User layout record, where you continue layout editing.

Prerequisites

- The User layouts list contains the row you need.

Steps

1. Select the required data row to open its layout record.
2. Select **Open in new tab** from the row context menu when you need the layout record in another browser tab.
3. Select **Default layouts** to return to the default-layouts area.

Result: The selected layout record opens for detailed work, the record opens in a new tab, or the Default layouts area is on screen.