

How to Add new column designer record

1. From Financial Reports module > click on **Financial Report Builder** menu.
 - a. From a new Report Builder record
 - i. In the **Report Builder search** click on **New**
 - ii. The new Row Builder screen will be opened. Enter a Report Name
 - iii. Click on **Column** field label
 - b. From an existing Report Builder record
 - i. In the **Report Builder search** select report/s by checking checkbox before it and click **Open**. Or you can also double-click on the selected record.
 - ii. The **Report Builder screen** will be opened showing the selected report. Click on **Column** field label
 - iii. The **Column Designer screen** will be opened showing the assigned Column Designer record.
 - iv. Click **New** in the Column Designer screen.
2. This will open a blank Column Designer screen.
3. Enter **Column Name** and **Description**.

Column Designer - Copper Test Column

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Copper Test Column Description: Column Test Column Type: User Defined Run Date: 05/10/2019

+ Insert X Remove Export View Filter (F3)

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	Row Name	Column Name								

Add Record

4. Add and configure columns in the grid section.
 - See [Grid section of the screen](#) for guide on how to work with grid section controls.
 - See [How to Configure a column](#) to show you how to setup rows based on the information you like to show on report.
5. Save the record. You can click **Save** or use the shortcut key **Ctrl+S**. In case you miss to save it and you click the **Close** or the **x button** at the top right corner of the screen or use the shortcut key **Alt+X** or **Esc**, i21 will prompt you if you would like to save it before closing the screen.

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Column Designer - Column Designer Test A

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Column Designer Test A Description: Column Designer Test A Column Type: User Defined Run Date: 08/24/2018

+ Insert X Remove Export View Filter (F3)

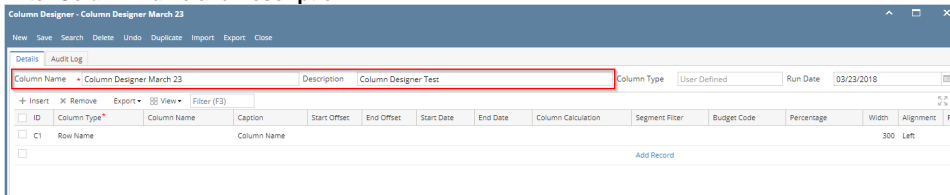
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4. Add and configure columns in the grid section.

- See [Grid section of the screen](#) for guide on how to work with grid section controls.
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• From Financial Reports module > click on **Financial Report Builder** menu.

1. From a new Report Builder record

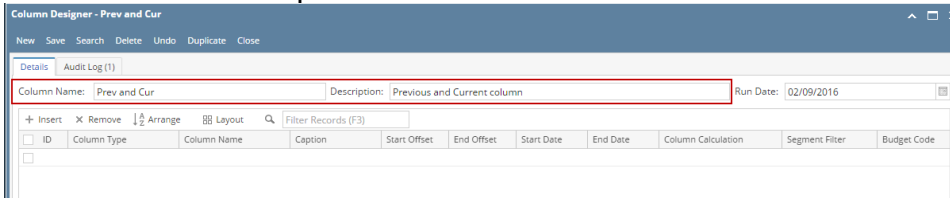
- a. In the **Report Builder** search click on **New**
- b. The new Row Builder screen will be opened. Enter a Report Name
- c. Click on **Column** field label

2. From an existing Report Builder record

- a. In the **Report Builder** search select report/s by checking checkbox before it and click **Open**. Or you can also double-click on the selected record.
- b. The **Report Builder** screen will be opened showing the selected report. Click on **Column** field label
- c. The **Column Designer** screen will be opened showing the assigned Column Designer record.
- d. Click **New** in the Column Designer screen.

• This will open a blank Column Designer screen.

• Enter **Column Name** and **Description**.



• Add and configure columns in the grid section.

- See [Grid section of the screen](#) for guide on how to work with grid section controls.
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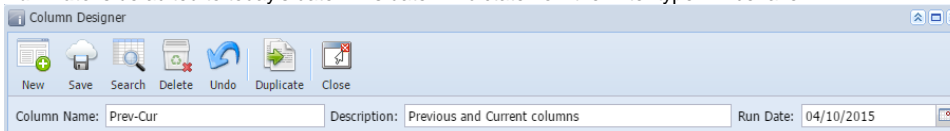
1. From Financial Reports module > Maintenance folder > double-click on **Column Designer** menu.

2. The Search Column Designer screen will open. Click **New toolbar button**.

3. This will open a blank Column Designer screen.

4. Enter **Column Name** and **Description**.

5. **Run Date** is defaulted to today's date. This date will dictate how the Filter type will behave.



6. Add and configure rows in the grid section.

- See [Grid section of the screen](#) for guide on how to work with grid section controls.
- See [How to Configure a column](#) to show you how to setup columns based on the information you like to show on report.

7. Save the record. You can click the **Save toolbar button** to save it. In case you miss to click this button and you click the **Close toolbar button** or the **x button** at the top right corner of the screen, i21 will prompt you if you would like to save it before closing the screen.

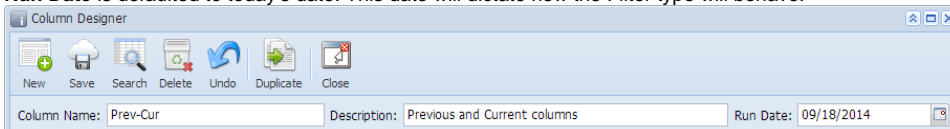
1. From General Ledger module > Financial Reports folder > Financial Report Designer folder > double-click **Column Designer**.

2. The Search Column Designer screen will open. Click **New toolbar button**.

3. This will open a blank Column Designer screen.

4. Enter **Column Name** and **Description**.

5. **Run Date** is defaulted to today's date. This date will dictate how the Filter type will behave.



6. Add and configure rows in the grid section.

- See [Grid section of the screen](#) for guide on how to work with grid section controls.
- See [How to Configure a column](#) to show you how to setup columns based on the information you like to show on report.

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