

How to Configure a column

1. A new row will be available in the grid section.
2. In the **Column Type** field, select a type for the column.
3. In the **Column Name** field, enter the name you would like to call the column. The value entered in this field may show on your financial report, granted the Caption field for that column is set to Column Name. This is discussed more on [How to Add Column Name Row](#).
4. In the **Caption** field, select the type of caption you want for the column. This is discussed more on [How to Add Column Name Row](#).
5. In the **Start Offset** field select the **Start Date Offset** from the available options to select from. This is discussed more on [How Start and End Offset works](#).
6. The **Start Date** field will show the date based on the Start Offset selected and the Run Date. This gives you a preview of what the Start Date will be. It is only when Custom is selected in the Start Offset field where you need to specify the date. The rest are computed by the system.
7. The **End Date** field will show the date based on the End Offset selected and the Run Date. This gives you a preview of what the End Date will be. It is only when Custom is selected in the End Offset field where you need to specify the date. The rest are computed by the system.
8. The **Column Calculation** field is used only on Column Calculation column type. This is discussed more on [How to Configure Formula for Column Calculation column](#).
9. The **Segment Filter** field is useful to the following column types since it allows you can specify location/s filter . This is discussed more on [How to Use Segment Filter in the Column Designer](#).
 - a. Beginning Balance
 - b. Budget
 - c. Credit
 - d. Credit Units
 - e. Debit
 - f. Debit Units
 - g. Ending Balance
 - h. GL Amounts
 - i. GL Trend
 - j. Units
10. The **Budget Code** field is used only on Budget column type. This is discussed more on [How to Add Budget column](#).
11. The **Percentage** field is used only on Percentage column type. This is discussed more on [How to Add Percentage column](#).
12. In the **Width** field, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
13. In the **Alignment** field, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
 - Select **Left** if you want it Left Aligned
 - Select **Right** if you want it Right aligned
14. In the **Format** field, assign how the numbers be shown in the column. Will it have decimals, money sign or in percentage format.
15. Check **Hidden** checkbox if you don't want the column be shown on the report. This is useful if you need a column that will be part of the formula of another column and you just need to derive the numbers extracted from that column to build the formula. This is discussed more on [How Hidden checkbox works when enabled](#) .

This is a sample of column designer record where columns are added and configured. Boxed in red is the grid section.

Column Designer - Current and Previous B

NewSaveSearchDeleteUndoDuplicateClose

DetailsAudit Log (16)

Column Name:Current and Previous B

Description:Current and Previous with percentage

Run Date:12/14/2015

+ InsertX RemoveArrangeLayoutFilter Records (F3)

☐	ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Alignment	Format	Hidden
☐	C1	Row Id		Column Name									160	Right	###0.00;(###0.00)	☐
☐	C2	Row Name		Column Name									160	Right	###0.00;(###0.00)	☐
☐	C3	GL Amounts	Previous	Column Name	BOY-1yr	EOY-1yr	01/01/2014	12/31/2014					160	Right	###0.00;(###0.00)	☐
☐	C4	Percentage	Previous %	Column Name								C3	160	Right	0.00%	☐
☐	C5	GL Amounts	Current	Column Name	BOY	EOY	01/01/2015	12/31/2015					160	Right	###0.00;(###0.00)	☐
☐	C6	Percentage	Current %	Column Name								C5	160	Right	0.00%	☐

The following will guide you on how to add and configure columns of your column designer.

- [How to Add None column](#)
- [How to Add Account Group column](#)
- [How to Add Account Type column](#)
- [How to Add Beginning Balance column](#)
- [How to Add Budget column](#)
- [How to Add Column Calculation column](#)
- [How to Add Credit column](#)
- [How to Add Credit Units column](#)
- [How to Add Debit column](#)
- [How to Add Debit Units column](#)
- [How to Add Ending Balance column](#)
- [How to Add Filter Accounts column](#)
- [How to Add GL Amounts column](#)
- [How to Add Percentage column](#)
- [How to Add Row ID column](#)
- [How to Add Row Name column](#)
- [How to Add Units column](#)
- [How to Add Units Description column](#)

1. A new row will be available in the grid section.
2. In the **Column Description** field, enter the name you would like to call the column. The value entered in this field may show on your financial report, granted the caption for that column is set to Column Header. This is discussed more on [How to Add Description Title Row](#).

3. In the **Caption field**, select the type of caption you want for the column. This is discussed more on [How to Add Description Title Row](#).
4. In the **Column Type field**, select a type for the column.
5. In the **Filter Type field**, select a date filter for the column. Notice, in the combo box list, the Start and End Dates are shown, which are based on the Run Date selected.
6. The **Related Columns field** is relevant only on the Column Calculation and Ending Balance column types. This is discussed more on [How to Configure Formula for Column Calculation column](#).
7. The **Segment Used field** is relevant only on the Segment Filter column type. This is discussed more on [How to add Segment Filter column](#).
8. The **Budget Code field** is relevant only on the Budget column type. This is discussed more on [How to add Budget column](#).
9. The **Start and End Date fields** are to be used only on column that has Filter Type of Custom.
10. In the **Width field**, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
11. In the **Alignment field**, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
 - Select **Left** if you want it Left Aligned
 - Select **Right** if you want it Right aligned
12. In the **Format field**, assign how the numbers be shown in the column. Will it have decimals, money sign or in percentage format.
13. Check **Hidden checkbox** if you don't want the column be shown on the report. This is useful if you need a column that will be part of the formula of another column and you just need to derive the numbers extracted from that column to build the formula. This is discussed more on [How Hidden checkbox works when enabled](#).

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ID	Column Description	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code	Start Date	End Date	Width	Alignment	Format	Hidden
1	Column Header	Row Id	Row Id							50	Left	#, #0.00;(#, #0.00)	☐
2	Column Header	Row Description	Row Description							250	Left	#, #0.00;(#, #0.00)	☐
3	Prev	Column Header	Calculation	Previous Fiscal Year						160	Right	#, #0.00;(#, #0.00)	☐
4	Cur	Column Header	Calculation	Fiscal Year						160	Right	#, #0.00;(#, #0.00)	☐
5	Total	Column Header	Column Calculation		C3 + C4					160	Right	#, #0.00;(#, #0.00)	☐

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- [How to Add Debit Units column](#)
- [How to Add Ending Balance column](#)
- [How to Add Filter Accounts column](#)
- [How to Add GL Amounts column](#)
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- [How to Add Units column](#)
- [How to Add Units Description column](#)

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3. In the **Caption field**, select the type of caption you want for the column. This is discussed more on [How to Add Description Title Row](#).
4. In the **Column Type field**, select a type for the column.
5. In the **Filter Type field**, select a date filter for the column. Notice that the Start and End Dates are shown, which are based on the Run Date selected.
6. The **Related Columns field** is relevant only on the Column Calculation column type. This is discussed more on [How to Configure Formula for Column Calculation column](#).
7. The **Start and End Date fields** are to be used only on column that has Filter Type of Custom.
8. In the **Width field**, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
9. In the **Alignment field**, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
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ID	Column Header	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code	Start Date	End Date	Width	Alignment	Format	Hidden
1		Column Header	Row ID							160	Center	#,##0.00;(#,##0.00)	☐
2		Column Header	Row Description							160	Left	#,##0.00;(#,##0.00)	☐
3	Previous Year	Year	Calculation	Previous Fiscal Year						160	Right	#,##0.00;(#,##0.00)	☐
4	Current Year	Year	Calculation	Fiscal Year						160	Right	#,##0.00;(#,##0.00)	☐

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