

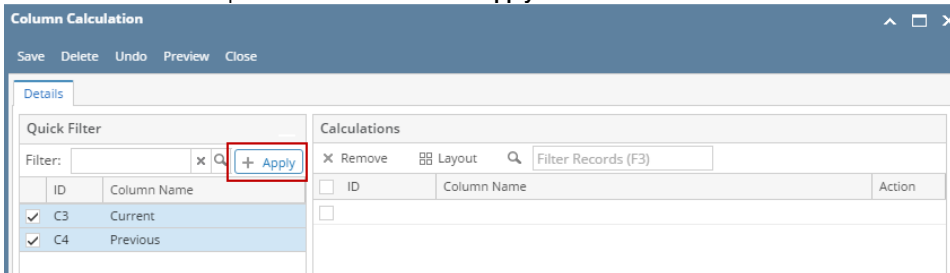
How to Configure Formula for Column Calculation column

The **Column Calculation** screen is where you configure formula for your Column Calculation column. These columns are available when you configure your formula.

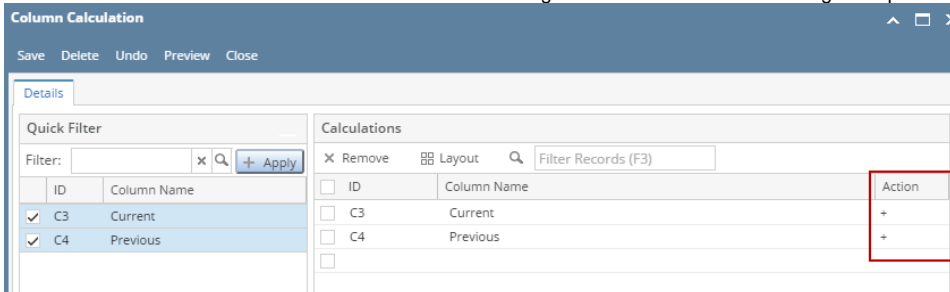
- Budget
- GL Amounts
- Debit
- Credit
- Debit Units
- Credit Units
- Units
- GL Trend
- another Column Calculation

The following will guide you on how to configure a formula column using the Column Calculation screen.

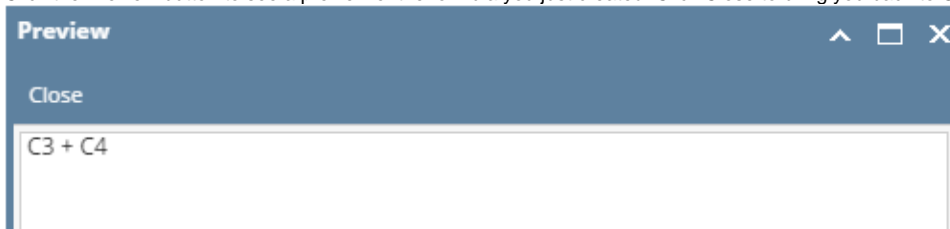
1. Select the columns to be part of the formula and click **Apply** button.



2. The columns selected will then be added to the Calculations grid. Use the Action field to assign an operator.

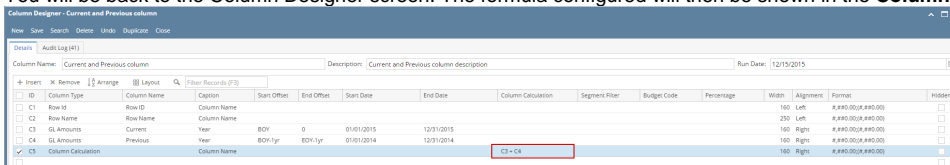


3. Click the Preview button to see a preview of the formula you just created. Click Close to bring you back to Column Calculation screen.



The **Reverse sign for expenses checkbox** at the bottom of the screen is used when part of your formula is Budget column type. See [How Reverse sign for expenses checkbox works when enabled](#) to show you how this option is being used.

4. Once you are good with the formula, click **Save** and **Close**.
5. You will be back to the Column Designer screen. The formula configured will then be shown in the **Column Calculation** field.



You will not be able to close the Column Calculation screen until a formula is configured. If you unintentionally selected the Column Calculation column type, then you may click the Delete toolbar button so you can close the Column Calculation screen without having to configure a formula. This will also delete the column calculation column added.

1. A new row will be available in the grid section.
2. In the **Id field**, select the column. The **Description field** will then show the description of the selected column.

Column Calculation

Save Delete Undo Close

Remove Filter Records (F3)

Id	Description	Action
3	Previous	

3. In the **Action field**, select an operator.

Column Calculation

Save Delete Undo Close

Remove Filter Records (F3)

Id	Description	Action
3	Previous	+

4. Repeat steps 1 to 3 as necessary to build your formula.

Column Calculation

Save Delete Undo Close

Remove Filter Records (F3)

Id	Description	Action
3	Previous	+
4	Current	+

Preview:
C3 + C4

☐ Reverse sign for expenses

Edited

i Notice as you work on adding rows and assigning an operator, the Preview field at the bottom of the screen will show you the configured formula. In that way, you have a better view while you are building the formula.



You will not be able to close the Column Calculation screen until a formula is configured. If you unintentionally selected the Column Calculation column type, then you may click the Delete toolbar button so you can close the Column Calculation screen without having to configure a formula. This will also delete the column calculation column added.

- Click the **Save toolbar button** to save and **Close toolbar button** to close the screen and apply the formula to the selected column.
- You will be back in the Column Designer screen. In the **Related Columns** field, notice that the formula built is shown.

ID	Column Description	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code
1		Column Header	None				
2		Column Header	Row Description				
3	Previous	Column Header	Calculation	Previous Fiscal Year			
4	Current	Column Header	Calculation	Fiscal Year			
5	Total	Column Header	Column Calculation		C3 + C4		

The **Column Calculation screen** is where you configure formula for your Column Calculation column.



Only Budget, Calculation, Debit, Credit, Debit Units, Credit Units and another Column Calculation columns will be available in building a formula column.

The following will guide you on how to configure a formula column.

- A new row will be available in the grid section.
- In the **ID field**, select the column. The **Description field** will then show the description of the selected row.

Column Calculation

Ok Cancel

Calculation:
C3

Delete Filter Records (F3)

Id	Description	Action
3	Previous Year	

- In the **Action** field, select an operator.

Column Calculation

Ok Cancel

Calculation:
C3

Delete Filter Records (F3)

Id	Description	Action
3	Previous Year	+

- Repeat steps 1 to 3 as necessary to build your formula.

Column Calculation

Ok Cancel

Calculation:
C3 + C4

Delete Filter Records (F3)

Id	Description	Action
3	Previous Year	+
4	Current Year	

i Notice as you work on adding rows and assigning an operator, the Calculation field at the top of the screen will show you the configured formula. In that way, you have a better view while you are building the formula.

- Click the **Ok** toolbar button to close the screen and apply the formula to the selected column.
- You will be back in the Column Designer screen. In the **Related Columns** field, notice that the formula built is shown.

Column Designer

New Save Search Delete Undo Duplicate Close

Column Name: Prev-Cur with total Description: Previous and Current columns Run Date: 09/22/2014

Delete Up Down Filter Records (F3)

ID	Column Header	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code	Start Date	End Date	Width	Alignment	Format	Header
1	Column Header	Column Header	None							160	Right	#,##0.00;(P,##0.00)	
1	Column Header	Row Id								160	Center	#,##0.00;(P,##0.00)	
2	Column Header	Row Description								360	Left	#,##0.00;(P,##0.00)	
3	Previous Year	Year	Calculation	Previous Fiscal Year						160	Right	#,##0.00;(P,##0.00)	
4	Current Year	Year	Calculation	Fiscal Year						160	Right	#,##0.00;(P,##0.00)	
6	Total	Column Header	Column Calculation		C3 + C4					160	Right	#,##0.00;(P,##0.00)	