

How to Add Segment Filter from Column Designer

The following will guide you on how to add Segment Filter from Column Designer.

1. Select any of these columns:
 - a. Beginning Balance
 - b. Budget
 - c. Credit
 - d. Credit Units
 - e. Debit
 - f. Debit Units
 - g. End Balance
 - h. GL Amounts
 - i. GL Trend
 - j. Units
2. Place your cursor in the **Segment Filter** field for the selected column. The dropdown button will be shown. Click on the first dropdown button.

The screenshot shows the 'Column Designer' window for a 'Balance Sheet' template. The 'Details' tab is active, showing a table of columns. The column 'GL Amounts' (C3) is selected, and its 'Segment Filter' field is open, displaying a dropdown menu with options: '0000', 'All Segment', 'Grain', 'Home Office', 'Indiana', and 'Ohio'.

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	Row Id	Row Id	Column Name							Add Record
C2	Row Name	Row Name	Column Name							Add Record
<input checked="" type="checkbox"/> C3	GL Amounts	Current Year	Column Name	BOT	0	01/01/1900	06/30/2019			
<input type="checkbox"/> C4	Units	Current Units	Column Name	BOT	0	01/01/1900	06/30/2019			
<input type="checkbox"/> C5	GL Amounts	Prior Year	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018			
<input type="checkbox"/> C6	Units	Prior Units	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018			
<input type="checkbox"/> C7	Units Description	Units Description	Column Name							
<input type="checkbox"/> C8	Ending Balance	Ending Balance	Column Name	BOT	0	01/01/1900	06/30/2019			
<input type="checkbox"/> C9	Percentage	Percentage	Column Name							

3. The **Segment Filter Group** screen will be opened.
4. Add and configure Segment Filter Group. Use the **Quick Filter grid**. Select the **Segment Codes** and click **Apply button**. The segment/s selected will be carried over to the grid at the right.



You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.

Example 1:

Segment Filter Group - 0002

New Save Search Delete Undo Close

Details Audit Log

Group Name 0002

Quick Filter

Type Location + Apply

Filter 0002

☐ Segment Code

☐ 0000

☐ 0001

☒ 0002

☐ 0003

☐ 0004

X Remove Export View Filter (F3)

Segment	Segment Code	Join
<input type="checkbox"/> Location	0002	Or

Example 2:

Segment Filter Group - 0003

New Save Search Delete Undo Close

Details Audit Log

Group Name 0003

Quick Filter

Type Location + Apply

Filter 0003

☐ Segment Code

☐ 0000

☐ 0001

☐ 0002

☒ 0003

☐ 0004

☐ 0005

X Remove Export View Filter (F3)

Segment	Segment Code	Join
<input type="checkbox"/> Location	0003	Or

Example 3:

Segment Filter Group - 0004 and 0005

New Save Search Delete Undo Close

Details Audit Log

Group Name 0004 and 0005

Quick Filter

Type Location + Apply

Filter 0004 and 0005

☐ Segment Code

☐ 0000

☐ 0001

☐ 0002

☐ 0003

☒ 0004

☒ 0005

☐ 0006

X Remove Export View Filter (F3)

Segment	Segment Code	Join
<input type="checkbox"/> Location	0004	Or
<input type="checkbox"/> Location	0005	Or

5. Save and close the **Segment Filter Group** screen.
6. You will be back to the **Column Designer** screen.

The following will guide you on how to add Segment Filter from Column Designer.

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 - g. End Balance

- h. GL Amounts
- i. GL Trend
- j. Units

2. Place your cursor in the **Segment Filter** field for the selected column. The dropdown button will be shown. Click on the first dropdown button.

Column Designer - Trial Balance Detail - September 04, 2018 16:26:48

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Trial Balance Detail - September 04, 2018 Description: Trial Balance Detail Template Column Type: User Defined Run Date: 09/04/2018

+ 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
C2	Row Id	Row Id	Column Name							Add Record
C3	Beginning Balance	Beginning Balance	Filter Type	BOT	-1	01/01/1900	08/31/2018			Add Record
<input checked="" type="checkbox"/> C4	GL Amounts	GL Amounts	Filter Type	BOY	0	01/01/2018	09/30/2018			
C5	Debit	Total Debit	Column Name	0	0	09/01/2018	09/30/2018		Segment Filter Group	
C6	Credit	Total Credit	Column Name	0	0	09/01/2018	09/30/2018		All Segment	
C7	Budget	Budget	Column Name	0	0	09/01/2018	09/30/2018		Grain	
C8	Units	Total Units	Column Name	0	0	09/01/2018	09/30/2018		Home Office	
C9	Units Description	Units Description	Column Name						Indiana	
									Ohio	
									Sow 1	

3. The **Segment Filter Group** screen will be opened.
4. Add and configure Segment Filter Group. Use the **Quick Filter grid**. Select the **Segment Codes** and click **Apply button**. The segment/s selected will be carried over to the grid at the right.



You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.

Example 1:

Segment Filter Group - 0000

New Save Search Delete Undo Close

Details Audit Log

Group Name 0000

Quick Filter

Type Location + Apply

Filter

☐ Segment Code

☒ 0000

☐ 0001

☐ 0002

☐ 0003

X Remove Export View Filter (F3)

<input type="checkbox"/> Segment	Segment Code	Join
<input type="checkbox"/> Location	0000	Or

Example 2:

Segment Filter Group - 0001

New Save Search Delete Undo Close

Details Audit Log

Group Name 0001

Quick Filter

Type Location + Apply

Filter

☐ Segment Code

☐ 0000

☒ 0001

☐ 0002

☐ 0003

X Remove Export View Filter (F3)

<input type="checkbox"/> Segment	Segment Code	Join
<input type="checkbox"/> Location	0001	Or

Example 3:

Segment Filter Group - Both

New Save Search Delete Undo Close

Details Audit Log

Group Name Both

Quick Filter

Type Location + Apply

Filter

☐ Segment Code

☒ 0000

☒ 0001

☐ 0002

☐ 0003

X Remove Export View Filter (F3)

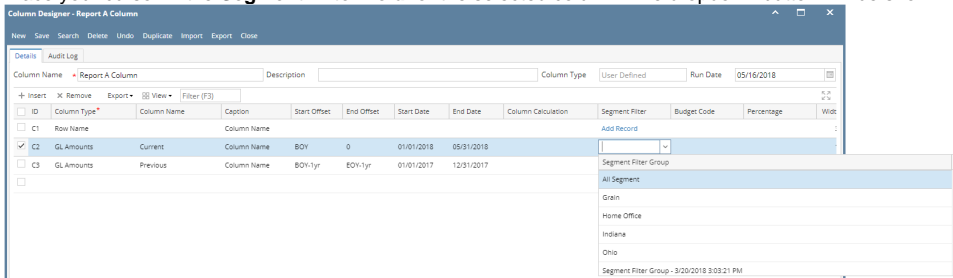
<input type="checkbox"/> Segment	Segment Code	Join
<input type="checkbox"/> Location	0001	Or
<input type="checkbox"/> Location	0000	Or

5. Save and close the **Segment Filter Group** screen.
6. You will be back to the **Column Designer** screen.

The following will guide you on how to add Segment Filter from Column Designer.

1. Select any of these columns:
 - a. Beginning Balance
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 - d. Credit Units
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 - f. Debit Units
 - g. End Balance
 - h. GL Amounts
 - i. GL Trend
 - j. Units

- Place your cursor in the **Segment Filter field** for the selected column. The dropdown button will be shown. Click on the first dropdown button.

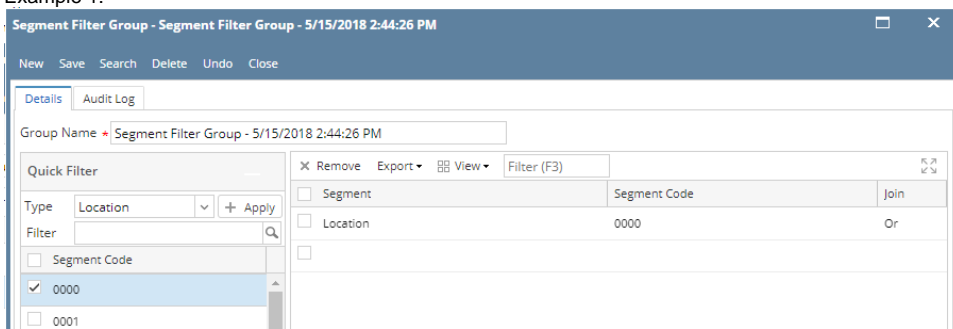


- The **Segment Filter Group** screen will be opened.
- Add and configure Segment Filter Group. Use the **Quick Filter grid**. Select the **Segment Codes** and click **Apply** button. The segment/s selected will be carried over to the grid at the right.

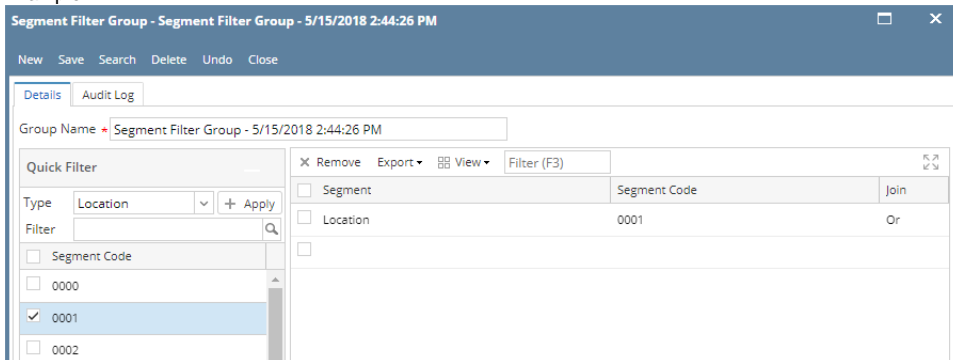


You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.

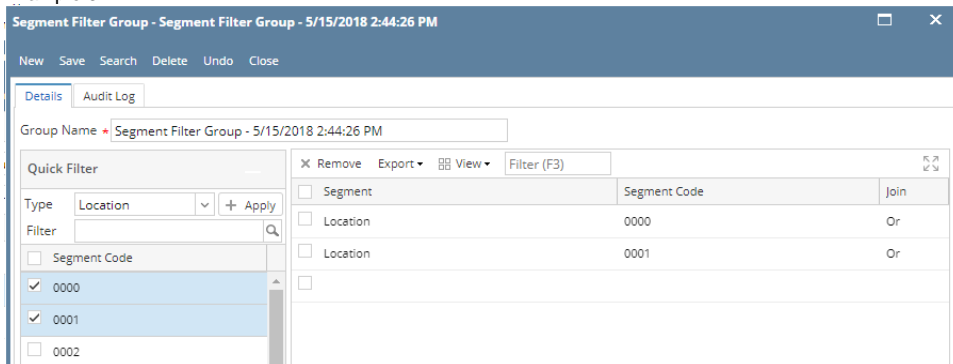
Example 1:



Example 2:



Example 3:



- Save and close the **Segment Filter Group** screen.
- You will be back to the **Column Designer** screen.

The following will guide you on how to add Segment Filter from Column Designer.

- Select any of these columns:

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- b. Budget
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You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.

Example 1:

Example 2:

Example 3:

5. Save and close the **Segment Filter Group** screen.
 6. You will be back to the **Column Designer** screen.
1. In a new blank row, click the dropdown combo box button in the **Segment** field and select a segment.

Available segments to show in the combobox list are those setup in the **Segment Accounts** screen (opened from General Ledger module >

Maintenance folder > double-click on Segment Accounts) > Segment Name panel. All Segments shown in that panel, except for Primary Account, will be available.

Column Segment Filter

Save Delete Undo Close

Remove Filter Records (F3)

Segment	Segment Code	Join
<input checked="" type="checkbox"/>		

Filter Records

Segment Name

Location

Segment Accounts

Save Undo Import Primary Import Segment Structure Groups Build Close

Segment Name

Primary Account

Location

Insert Remove Filter:

Code	Description
<input type="checkbox"/> 1000	Loc A
<input type="checkbox"/> 2000	Loc B
<input type="checkbox"/> 3000	Loc C

- Select segment code for the Segment selected. Only segment codes for the selected segment will be available for selection,

Column Segment Filter

Save Delete Undo Close

Remove Filter Records (F3)

Segment	Segment Code	Join
<input type="checkbox"/>		
<input checked="" type="checkbox"/>		Or
<input type="checkbox"/>		

Filter Records

Code

1000

2000

3000

Segment Accounts

Save Undo Import Primary Import Segment Structure Groups Build Close

Segment Name

Primary Account

Location

Insert Remove Filter:

Code	Description
<input type="checkbox"/> 1000	Loc A
<input type="checkbox"/> 2000	Loc B
<input type="checkbox"/> 3000	Loc C

- This is how it looks like after segment filter had been configured.

Segment	Segment Code	Join
Location	1000	Or



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

- 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**, i21 will prompt you if you would like to save it before closing the screen.
- You will be back to the Column Designer record you are working. The **Segment Used** field will then show an indicator that there is already segment configuration for the selected column.

ID	Column Description	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code
1		Column Header	Row Id				
2		Column Header	Row Description				
3	1000	Column Header	Segment Filter			[Location] = 1000	

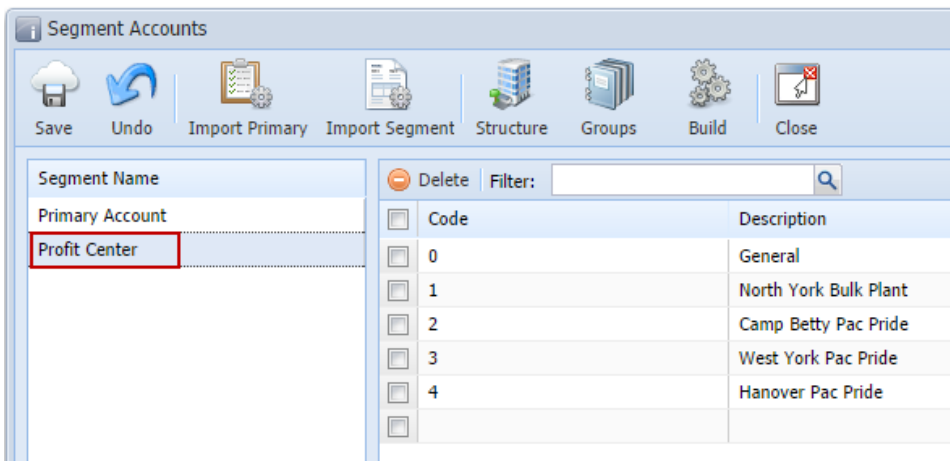
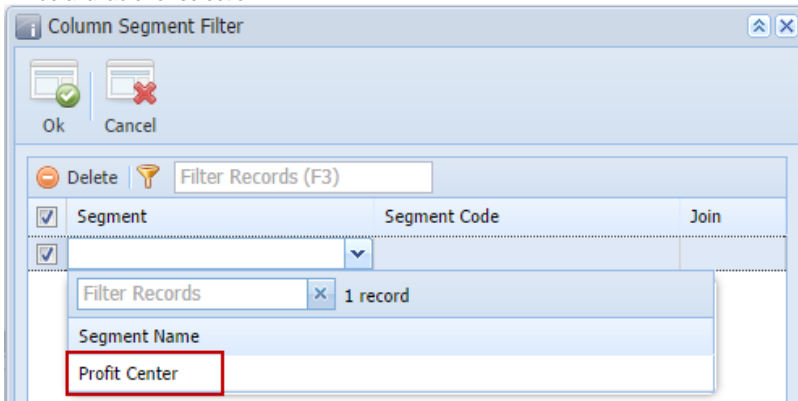


You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.

- In a new blank row, click the dropdown combo box button in the **Segment** field.

Available segments to show in the combobox list are those setup in the **Segment Accounts screen** (opened from General Ledger module >

Maintenance folder > double-click on Segment Accounts) > Segment Name panel. All Segments shown in that panel, except for Primary Account, will be available for selection.



2. Select segment code for the Segment selected. Only segment codes for the selected segment will be available for selection,

3. This is how it looks like after segment filter had been configured.

4. Then click **Ok** toolbar button.
5. You will be back to the Column Designer record you are working. The **Segment Used** field, will then show an indicator that there is already segment configuration for the selected column.



You can select to add single, multiple or all segments in one configuration. If you intend to configure the column to select All segments, instead of having to select all the segment codes for the selected segment name, you will have to leave it blank. Both will have the same result.