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.

olumn Na	ame 🔹 Balance Sheet -	June 20, 2019 10:2:58	Description	Standard Balanc	e Sheet Templa	te	Column Type	User Defined	Run Dat	e 06/20/201	9
+ Insert	× Remove Export •	B: View - Filter (F3)									5.7 2.5
ID	Column Type*	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Se	gment Filter	Budget (
C1	Row Id	Row Id	Column Name						Ad	d Record	
C2	Row Name		Column Name						Ad	d Record	
✓ C3	GL Amounts	Current Year	Column Name	BOT	0	01/01/1900	06/30/2019				~
C4	Units	Current Units	Column Name	BOT	0	01/01/1900	06/30/2019		Segment	Filter Group	
C5	GL Amounts	Prior Year	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018		0000		
C6	Units	Prior Units	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018		All Segm	ent	
C7	Units Description	Units Description	Column Name						Grain		
C8	Ending Balance	Ending Balance	Column Name	BOT	0	01/01/1900	06/30/2019		Home Of	fice	
C9	Percentage	Percentage	Column Name						Indiana		

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				x
New Save Search Delete Undo Close				
Details Audit Log				
Group Name * 0002				
Quick Filter	🗙 Remove Export 🕶 🔡 View 🗸 Filter (F3)			К Л Ц Ц
Type Location - + Apply	Segment	Segment Code	Join	
Filter	Location	0002	Or	
Segment Code				
0000				
0001				
0002				
0003				
0004				

Example 2:

Segment Filter Group - 0003			□ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * 0003			
Quick Filter	🗙 Remove Export 🕶 😬 View 🗸 Filter (F3)		К.Я. 22 У
Type Location v + Apply	Segment	Segment Code	Join
Filter	Location	0003	Or
Segment Code			
0000			
0001			
0002			
0003			
0004			
0005			

Example 3:

Segment Filter Group - 0004 and 0005			□ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * 0004 and 0005			
Quick Filter	× Remove Export → 🔠 View → Filter (F3)		К.Л. И У
Type Location ~ + Apply	Segment	Segment Code	Join
Filter	Location	0004	Or
Segment Code	Location	0005	Or
0000			
0001			
0002			
0003			
0004			
0005			
0006			

- 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

 - 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.

Column Na + Insert	× Remove Export •	tail - September 04, 20 88 View - Filter (F3)		Trial Balance Det	ail Template						
ID		88 View - Filter (F3)					Column Typ	e User Defined	Run Date 09/04/20	18 l	
										5. 21	
	Column Type*	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget	
	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		
✓ 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		
C7	Budget Units	Budget Total Units	Column Name Column Name	0	0	09/01/2018	09/30/2018		Home Office		

3. 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:

Segment Filter Group - 0000			⊐ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * 0000			
Quick Filter	X Remove Export - ⊞ View - Filter (F3)	К.Л. 21 У
Type Location - + Apply	Segment	Segment Code	Join
Filter	Location	0000	Or
Segment Code			
✓ 0000			
0001			
0002			
0003			

Example 2:

Segment Filter Group - 0001			□ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * 0001			
Quick Filter	🗙 Remove Export 🕶 🔠 View 🕶	Filter (F3)	2 N N N N N N N N N N N N N N N N N N N
Tree Local Laboration	Segment	Segment Code	Join
Type Location ~ + Apply	Location	0001	Or
Filter Q			
Segment Code			
0000			
✓ 0001			
0002			
0003			

Example 3:

Segment Filter Group - Both			□ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * Both			
Quick Filter	🗶 Remove Export 🕶 🔠 View 🕶 Filter (F3)		К Л И И
Type Location V + Apply	Segment	Segment Code	Join
Type Location - + Apply Filter	Location	0001	Or
Segment Code	Location	0000	Or
✓ 0000			
0001			
0002			
0003			

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

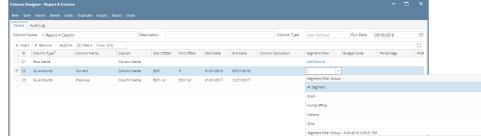
The following will guide you on how to add Segment Filter from Column Designer.

- 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.



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 - Segment Filter Grou	p - 5/15/2018 2:44:26 PM			×
New Save Search Delete Undo Close				
Details Audit Log				
Group Name * Segment Filter Group - 5/15/2	2018 2:44:26 PM			
Quick Filter	× Remove Export - ⊞ View - Filter (F3)			К.Л Ц.Ч
	Segment	Segment Code	Join	
Type Location - + Apply Filter Q	Location	0000	Or	
Segment Code				
✓ 0000				
0001				

Example 2:

Segment Filter Group - Segment Filter Grou	p - 5/15/2018 2:44:26 PM		
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * Segment Filter Group - 5/15/2	2018 2:44:26 PM		
Quick Filter	× Remove Export • 🗄 View • Filter (F3)		
Type Location ~ + Apply	Segment	Segment Code	Join
Type Location V + Apply Filter Q	Location	0001	Or
Segment Code			
0000			
✓ 0001			
0002			

Example 3:

Segment Filter Group - Segment Filter Grou	p - 5/15/2018 2:44:26 PM		□ ×
New Save Search Delete Undo Close			
Details Audit Log			
Group Name * Segment Filter Group - 5/15/2	018 2:44:26 PM		
Quick Filter	🗶 Remove Export 🕶 🔠 View 🕶 Filter (F3)		K 7 2 3
Type Location - + Apply	Segment	Segment Code	Join
Filter	Location	0000	Or
Segment Code	Location	0001	Or
✓ 0000 ^			
0001			
0002			

- 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
- 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.

	ight - contene and river														
Details A	Audit Log (20)														
Column Na	me: Current and Previou	is B			Des	cription: Current and Pre	vious with percentage				Run Dat	n 12/14	2015		8
+ Insert	× Remove ↓ ≜ Arrange	El Layout Q, F	Iter Records (F3)												
ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Algement	Format	Hidden
C1	None		Column Name									160	Right	#,##0.00;(#,##0.00)	2
a	Row Id		Column Name									160	Right	#,##0.00;(#,##0.00)	
C C	Row Name		Column Name						_			160	Right	#,##0.00;(#,##0.00)	
✓ C4	GL Amounts	Previous	Column Name	BOY-1yr	EOY-1yr	01/01/2014	12/31/2014					160	Right	#,##0.00;(#,##0.00)	
C5	Percentage	Previous %	Column Name								C4	160	Right	0.00%	
6	GL Amounts	Current	Column Name	BOY	EOY	01/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	
0	Percentage	Current %	Column Name								C6	160	Right	0.00%	

- 3. 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:

Segment Filter Group - 1000			~ □ ×
New Save Search Delete Undo Close			
Details			
Group Name: 1000			
Quick Filter	🗙 Remove 🔠 Layout 🔍 Filter Rec	ords (F3)	
Type: Location - + Apply	Segment	Segment Code	Join
Filter: X Q	Location	1000	Or
Segment Code			
✓ 1000			
2000			

Example 2:

Segment Filter Group - 2000			~ □ ×
New Save Search Delete Undo Close			
Details			
Group Name: 2000			
Quick Filter	X Remove 🔠 Layout 🔍 Filter Records	(F3)	
Type: Location ~ + Apply	Segment	Segment Code	Join
Filter: × Q	Location	2000	Or
Segment Code			
1000			
2000			

Example 3:

New Save Search Delete	Undo Close			
Details				
iroup Name: Both				
Quick Filter		X Remove 🔠 Layout 🔍 Filter Record	ds (F3)	
Type: Location	+ Apply	Segment	Segment Code	Join
Filter:	×Q	Location	1000	Or
		Location	2000	Or
Segment Code		Location		

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.

	Il be available.	,		····· ···· ···· ···· ···· ···· ···· ····
	Column Segment Filter		۵	
	Save Delete Undo Close			
	Remove Filter Records (F3)	Comment Code	lain	
	Segment	Segment Code	Join	
	Filter Records			
	Segment Name Location			
	Location		- 1	
	Segment Accounts			
		B 3 (M	Ž. 🕅	1
	Save Undo Import Primary Impor	t Segment Structure Groups	Build Close	
	Segment Name	Insert Remove Filter:		٩
	Primary Account	Code	Descriptio	n
	Location	1000	Loc A	
		2000	Loc B Loc C	
2 54	elect segment code for the Segment se			ent will be available for selection
2. 00	Column Segment Filter	lotted. Only segment codes for the		
	T 💽 💟 🖸		-	
	Save Delete Undo Close			
	😑 Remove 💡 Filter Records (F3)			
	Segment	Segment Code	Join	Run Date: 0
	Location	v (Or	
		Filter Records		
		Code		
		1000		
		2000		
	Segment Accounts	3000		
			<u></u>	
		🔒 🤳 🗊 .	🗞 🛃	
	Save Undo Import Primary Impor	t Segment Structure Groups	Build Close	
	Segment Name	😳 Insert 🤤 Remove 🛛 Filter:		٩
	Primary Account	Code	Description	1
	Location	1000	Loc A	

2000

3000

Loc B

Loc C

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

Column Segment Filter								
Save Delete Undo Close								
Remove 💡 Filter Records (F3)								
Segment	Segment Code	Join						
Location	1000	Or						

- A 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.
- 4. 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.
- 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.

	Column	Designer								
New Save Search Delete Undo Duplicate Close										
Co	Column Name: Segment Description: Segment columns Run Date: 04/10/2015									
	Remov	ve 🔺 Up 🔻 Down	Filter Records (F3)							
E	ID	Column Description	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code		
E] 1		Column Header	Row Id						
E] 2		Column Header	Row Description						
E] 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.

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

4

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.

Column Segment Filter	× ×
Ok Cancel	
😑 Delete 🛛 🖓 Filter Records (F3)	
Segment Segment Code Join	
Filter Records × 1 record	
Segment Name	
Profit Center	2
Segment Accounts	
Save Undo Import Primary Import Segment Structure Groups Build	Close
Segment Name	Q
Primary Account Code	Description
Profit Center 0	General
1	North York Bulk Plant
2	Camp Betty Pac Pride
3	West York Pac Pride
4	Hanover Pac Pride

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

Column Segment Filter		
Opelete P Filter Records (F3)		
Segment Profit Center	Segment Code Join	
	0 × 5 records	
	Code	
	0	
	1	
	2	
	3 4	
	1	
Segment Accounts		
Save Undo Import Primary Impo	rt Segment Structure Groups Build	3 Close
Segment Name	😑 Delete 🛛 Filter:	٩
Primary Account	Code	Description
Profit Center	0	General
	1	North York Bulk Plant
	2	Camp Betty Pac Pride West York Pac Pride
	3	Hanover Pac Pride

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

Column Segment Filter		× ×
Ok Cancel		
😑 Delete 💡 Filter Records (F3)		
Segment	Segment Code	Join
Profit Center	0	

4. Then click **Ok toolbar button**.

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.

Column D	esigner												
New Sav		ndo Duplicate Close	•										
Column Nam	ne: SegmentFilter Comm	non		Description:						Run Dab	e: 09/22/20	14	3
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	Hidden
1		Column Header	Row Description							160	Right	#,##0.00;(#,##0.00)	
2		Column Header	Segment Filter	As Of		fit Center] = 0 ····				160	Right	#,##0.00;(#,##0.00)	

A 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.