How to Use Segment Filter field in the Report Settings screen
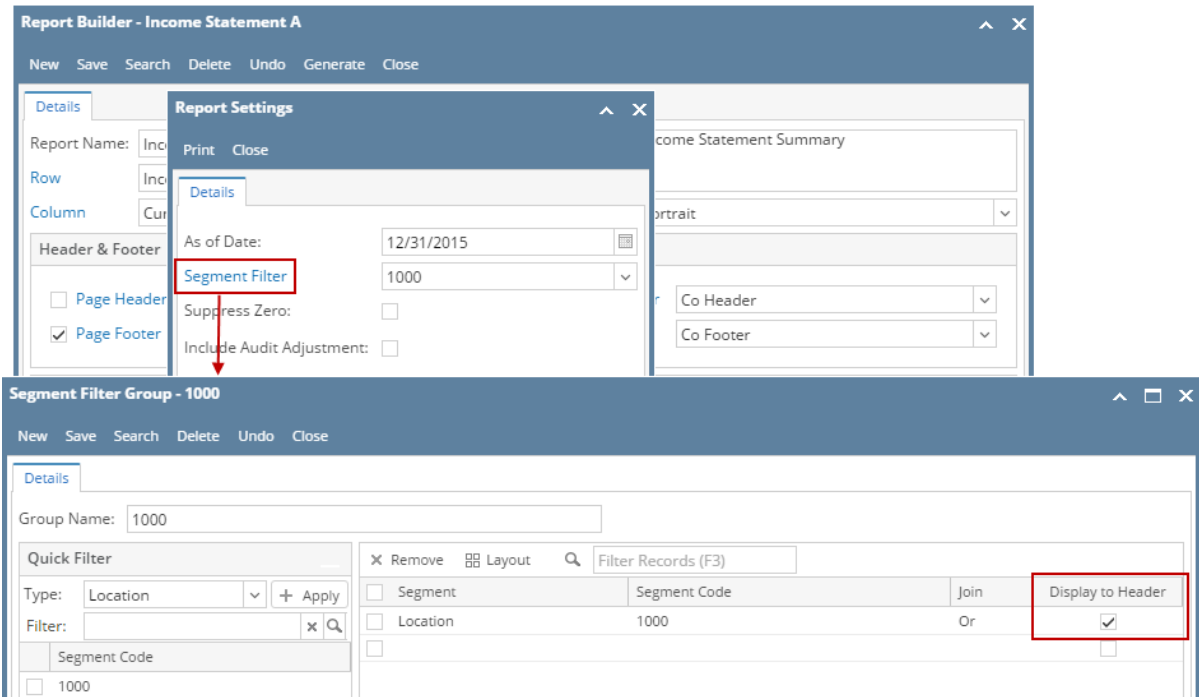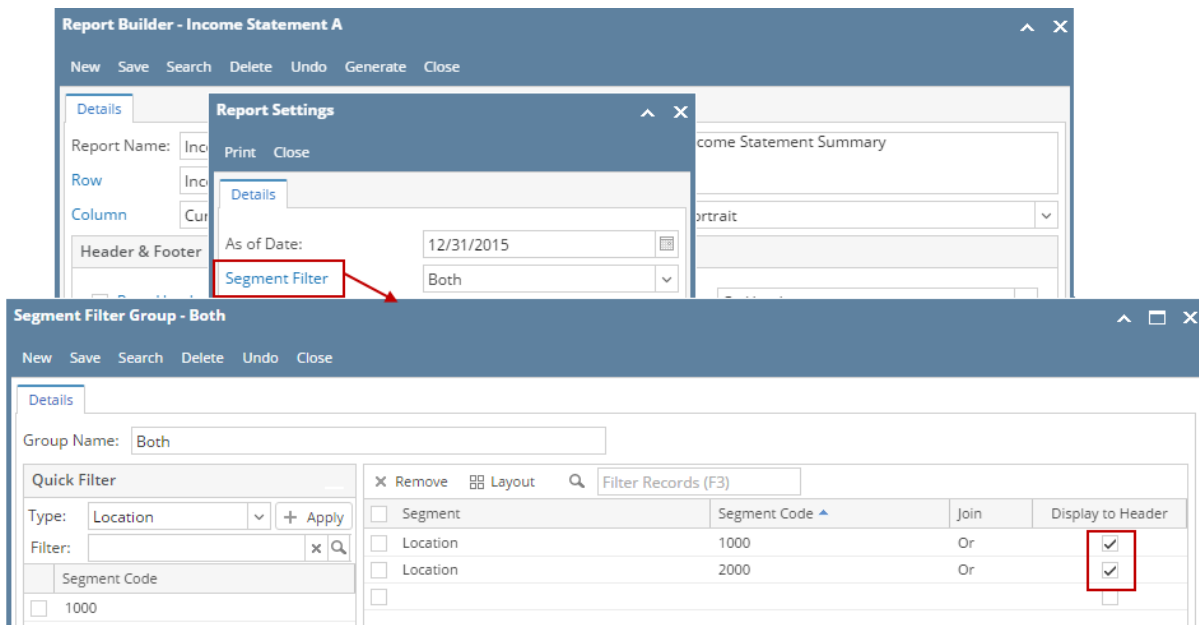
1. In the Report Settings screen, select a **Segment Filter**. Then click the **Segment Filter label** to open the Segment Filter Group screen.
2. If you want the Segment Filter be shown on the report when previewed or printed, check the **Display to Header checkbox,** else leave it unchecked.

Here's how it is shown when report is previewed/printed. Highlighted section is the Segment Filter Group type header/footer.

If multiple segments are checked, then all these segments are shown on the report.

Segment Filter Group - Both

New   Save   Search   Delete   Undo   Close

Details

Group Name: Both

Quick Filter

Type: Location   + Apply
Filter: x

Segment Code
□   1000

X Remove   ⊞ Layout   🔍   Filter Records (F3)

	Segment	Segment Code ▲	Join	Display to Header
□	Location	1000	Or	✓
□	Location	2000	Or	✓
□				

i21 Test Company
Income Statement A
As Of 12/31/2015 11:59:59 PM

Wednesday, February 17, 2016
7:55 PM

Location: 1000 Or Location: 2000

Row ID	Row Name	2015	2014	Total
R4	Revenue	18,329.75	1,000.00	19,329.75
R5	Expense	16,952.74	0.00	16,952.74
R7	Net Income	1,377.01	1,000.00	2,377.01

You can enhance this header/footer by setting its **Font Properties** and **Row Height**. See How to Configure header and footer font properties and row height topic to guide you on how to do this.

Say this is the column designer configuration.

Column Designer

New   Save   Search   Delete   Undo   Duplicate   Close

Column Name: SegFil   Description: Segment Filter   Run Date: 04/13/2015

Remove   ▲ Up   ▼ Down   Filter Records (F3)

	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							100	Left	#,##0.00;(#,##0.00)	□
□	2		Column Header	Row Description							250	Left	#,##0.00;(#,##0.00)	□
□	3	1000 - Loc A	Column Header	Segment Filter	Fiscal Year		[Location] = 1000				160	Right	#,##0.00;(#,##0.00)	□
□	4	2000 - Loc B	Column Header	Segment Filter	Fiscal Year		[Location] = 2000				160	Right	#,##0.00;(#,##0.00)	□
□	5	3000 - Loc C	Column Header	Segment Filter	Fiscal Year		[Location] = 3000				160	Right	#,##0.00;(#,##0.00)	□
□	6	All Segments	Column Header	Segment Filter			[Location] = 10...				160	Right	#,##0.00;(#,##0.00)	□
□														□

And this column designer is used as component of one of your financial reports.

Report Builder

New   Save   Search   Delete   Undo   Generate   Close

Report Name: Income Statement   Description: Income Statement by Account
Row: IS
Column: SegFil   Orientation: Portrait

1. When printing report, make sure that **Show Report Settings checkbox** is checked. Click **Generate toolbar button.**

2. The **Report Setting screen** opens. In the **Segment Filter field** select the segment you want all your columns with Segment Filter column type be filtered. Take note that this overrides what had been setup in the Column type segment filter.

If you have not yet configured a segment filter, click the **ellipsis button** to open the **Segment Filter Group screen** to add or edit a segment filter. See How to Configure Segment Filter Group screen.

3. If you want to print the report but would like to filter only those transpired for a specific segment like shown in the screenshot below, then you can create and configure the **Segment Filter Group screen** to reflect that segment group only and select that in the Segment Filter field when printing the report.

See in the below report, only the totals for selected segment filter is shown in the report, other segments are showing 0.00.

Income Statement
As Of 4/14/2015

Tuesday, April 14, 2015
10:01 AM

		1000 - Loc A	2000 - Loc B	3000 - Loc C	All Segments
R1	40000 - Sales	2,500.00	0.00	0.00	2,500.00
R2	50000 - Cost of Goods Sold	800.00	0.00	0.00	800.00
R7	Gross Margin	1,700.00	0.00	0.00	1,700.00
R9	*Gross Margin Rate*	68.00%	NaN	NaN	68.00%
R4	60000 - Other Expenses	900.25	0.00	0.00	900.25
R6	70000 - Other Revenues	200.00	0.00	0.00	200.00
R11	**Net Income**	999.75	0.00	0.00	999.75

You can even create different Segment groups with its corresponding segment filter configuration so that you will just have to select it when printing reports. Below is an example of filters for difference segment groups.

And here is a sample of multiple segments configured for a segment filter group.

See in the below report, totals for selected segment filters are shown in the report.

Income Statement
As Of 4/14/2015

Tuesday, April 14, 2015
10:10 AM

|		1000 - Loc A	2000 - Loc B	3000 - Loc C	All Segments
R1	40000 - Sales	2,500.00	1,100.00	800.00	4,400.00
R2	50000 - Cost of Goods Sold	800.00	250.00	150.00	1,200.00
R7	Gross Margin	1,700.00	850.00	650.00	3,200.00
R9	*Gross Margin Rate*	68.00%	77.27%	81.25%	72.73%
R4	60000 - Other Expenses	900.25	50.00	30.00	980.25
R6	70000 - Other Revenues	200.00	0.00	0.00	200.00
R11	**Net Income**	999.75	800.00	620.00	2,419.75

Say this is the column designer configuration. **Segment Filter** column here does not have Column Segment Filter configuration, as the Segment Used field shows blank.
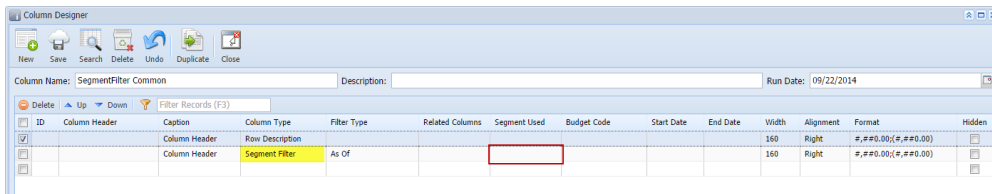
And this column designer is used as component of one of your financial reports.
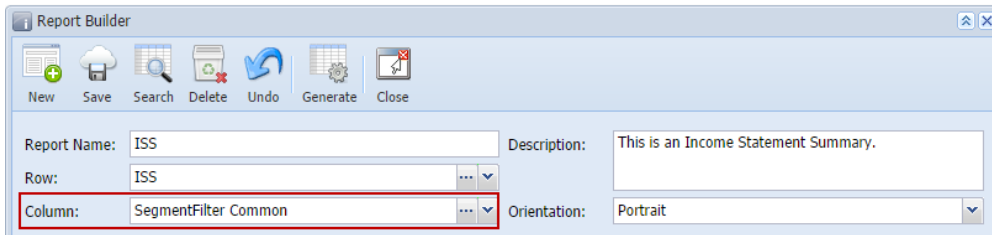
1. When printing report, make sure that **Show Report Settings checkbox** is checked. Click **Generate toolbar button.**
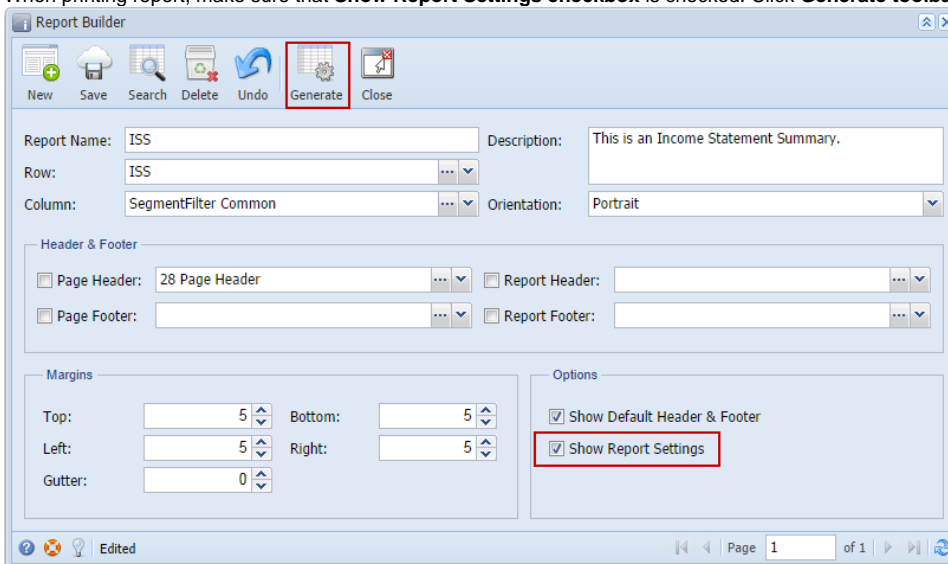

2. The **Report Setting screen** opens. In the **Segment Filter field** select the segment you want all your columns with Segment Filter column type be filtered. Take note that this overrides what had been setup in the Column type segment filter.
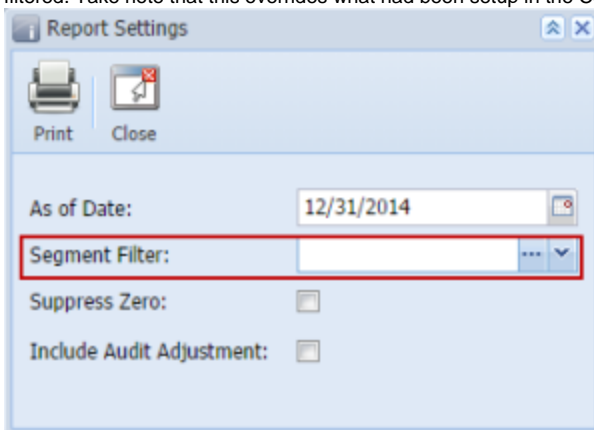
If you have not yet configured a segment filter, click the **ellipsis button** to open the **Segment Filter Group screen** to add and configure a filter. See How to Add Segment Filter from Column Designer.

3. If you want to print the report but would like to filter only those transpired for a specific segment like shown in the screenshot below, then you can create and configure the **Segment Filter Group screen** to reflect that segment group and select that in the Segment Filter field when printing the report.
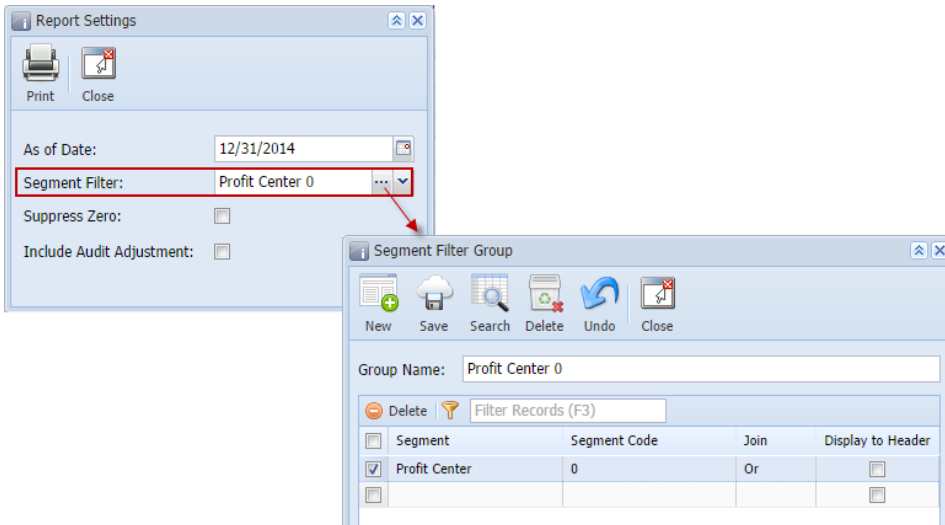
You can even create different Segment groups with its corresponding segment filter configuration so that you will just have to select it when printing reports. Now the Column Designer record with Segment Fitler column type setup becomes just a template and it is the **Segment Filter field** in the Report Settings screen who controls what information to show based on the selected segment filter.

4. Here's how it is shown when report is previewed/printed.

The totals above reflect only of the Profit Center > 0 - General.