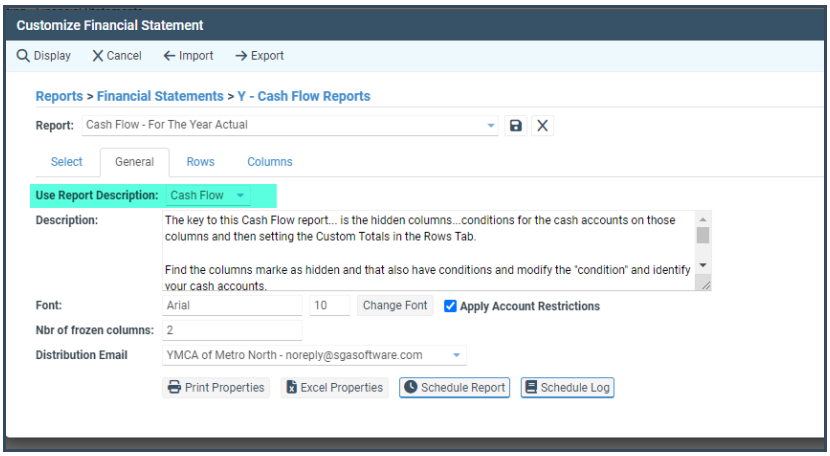
Last Modified on 07/10/2026 3:02 pm EDT

General Tab Options

Customize Report > General Tab

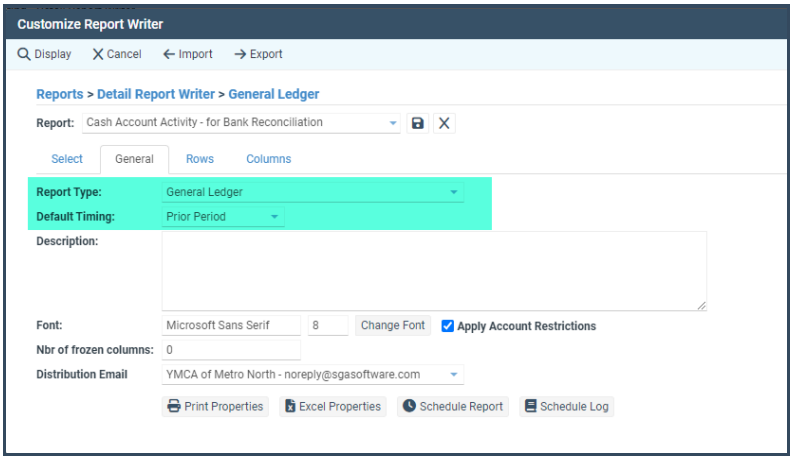
Each section will show highlighted items that are not present on all report writers.

Financial Statements

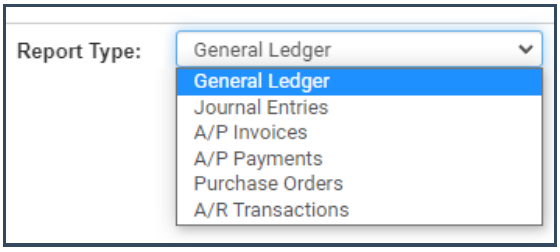


- **User Report Description:** This is where you select which set of report descriptions that the report needs to use.

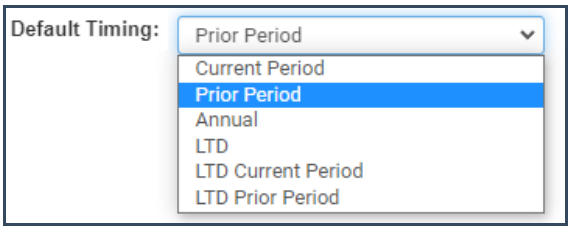
Detailed Report Writer



- **Report Type:** Refers to the type of transactions that the report is pulling. Depending on the type chosen, different fields will be available.

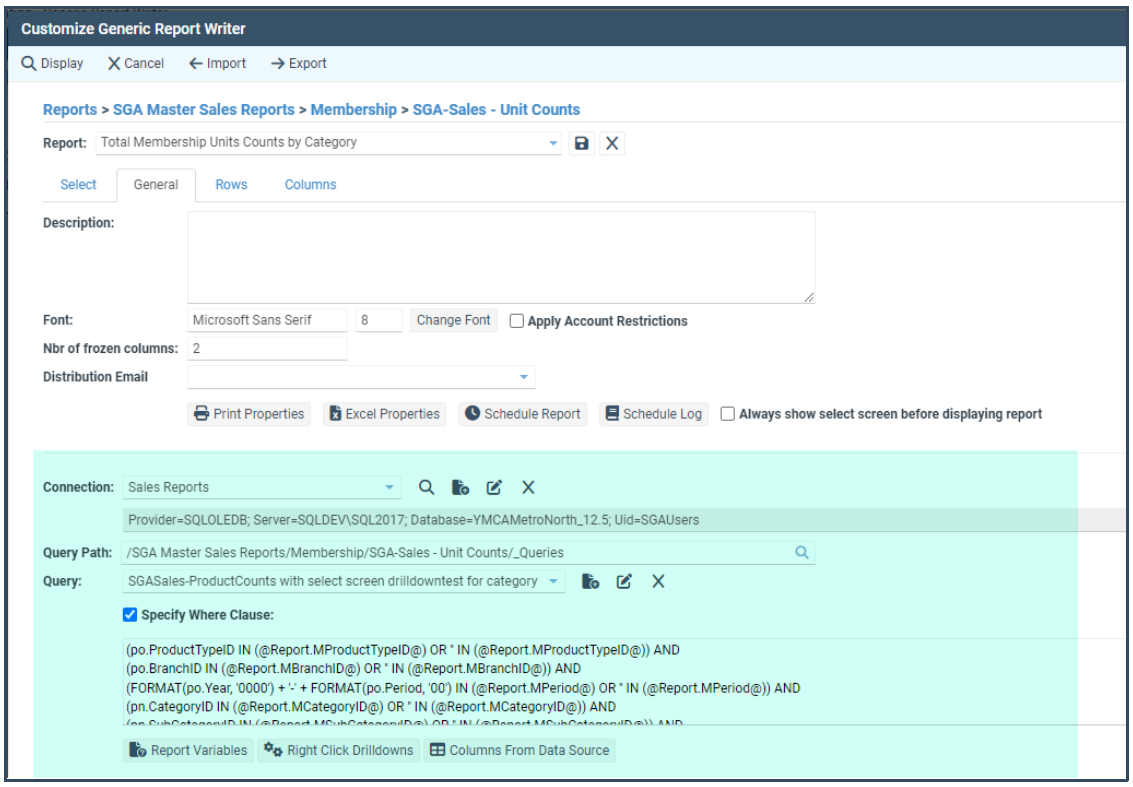


- **Default Timing:** Refers to the time period that the report defaults to when opened.



Generic Report Writer

NOTE: *Due to the flexible nature of this report writer, it contains multiple advanced options that are not for standard users. Please contact an SGA team member for further assistance and training before editing these options.*

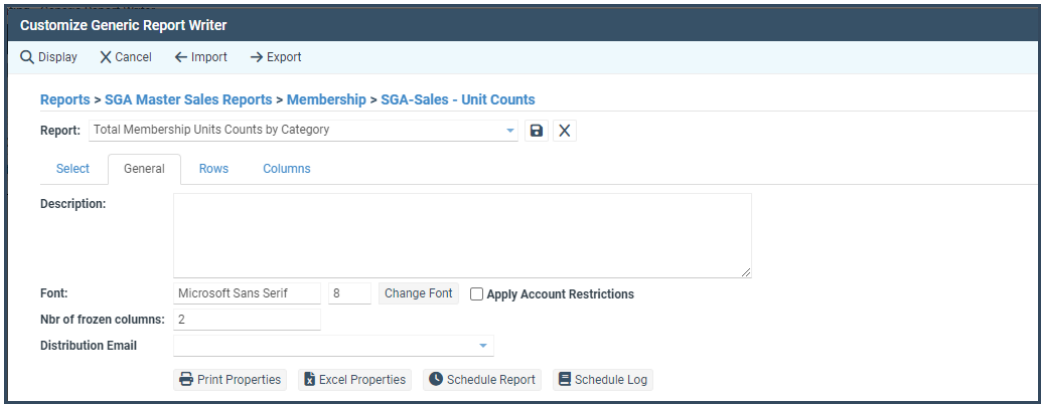


- ***Connection:** This tells the report where to get the data it needs for the report. Most connections will be the main database for your organization and are set up when you start using SGA.
- **Query Path:** The folder that contains the query being used.
- ***Query:** The logic that tells the report what data to pull. This is an advanced feature and should only be used by someone who has a basic understanding of SQL code.

Contact support@sgasoftware.com for further information.

- ***Columns From Data Source:** This allows additional columns to be pulled in from a separate data source.
- ***Specify Where Clause:** When checked, this is the where clause that fulfills the **%Where%** variable within the query.
- **Report Variables:** This is the setup of the filters that can be used on the Select Tab. See the Report Variables article for more information.
- **Always show select screen before displaying report:** When checked, you are unable to display the report until a user has navigated to the select screen.
- **Right Click Drilldowns:** This is the setup of the drill-down paths after the report is generated. See the Right Click Drilldowns article for more information.

General Tab Options on All Report Writers



- **Description:** This is the description that shows on the report folders grid. It is just a text box.
- **Font:** The font name and size that all data is displayed and printed in.
- **Nbr of frozen columns:** Freezes the left-most columns so that when you scroll to the right, these columns will always stay in view.
- **From Email:** When choosing to email the report, this is the email it will come from.
- **Apply account restrictions:** If checked, this applies G/L account restrictions to the report. If unchecked, any user who runs this report will be able to view all accounts in this report regardless of their restrictions. User permission level 35 or higher is required on Financial Statements to change this check box.

Print Properties

- **General**
  - Defines how/when you want the following items printed: Gridlines, Header line, Bold headers and totals, Color/shades

    - Line Spacing: Defined in pixels (100 pixels is approx. 1 inch)
- **Page**
    - Defines page orientation, size, and scale
- **Margins**
- **Header/Footer**
    - Uses variables to define what should be printed in these areas
- **Letter Head**
    - This allows for a custom letterhead to be printed at the top of a report when printed as a PDF. This is an advanced option and requires a Special Form to be set up. Please contact the SGA support team for assistance with this feature.
- **Special Forms Footer**
    - This allows for a custom letterhead to be printed at the top of a report when printed as a PDF. This is an advanced option and requires a Special Form to be set up. Please contact the SGA support team for assistance with this feature.