Columns Tab Options

Last Modified on 03/13/2024 2:50 pm EDT

Customize Report > Columns Tab

Columns Tab of Customize Report

- Show true sign: (Financial Statements only) Normally, signs are shown as positive for everything unless it is truly backward from the category's true nature. For example, revenue accounts show as positive as well as expense. If this is checked, figures will show with their true sign; revenue will show as negative. See sign control for more info.

Toolbar

- New: Add a single new column
- Add Multiple New Columns
    - Add All Columns
    - Select columns to add: This will open a window that allows a user to multi-select available columns
    - Select Pulse Form columns: This will open a window that allows a user to multi-select multiple form columns that are set up in their SGA Pulse system.
    - Select Pulse Attachment columns: This will open a window that allows a user to multi-select multiple form attachment columns that are set up in their SGA Pulse system. The data displayed will be the file name of the attachment. If more than one attachment was uploaded for that field, the most recent file name will display.
    - Select Pulse Agreement columns: This will open a window that allows a user to multi-select information about an agreement that was acknowledged. If more than one agreement is found that meets the criteria, the most recent agreement will be shown.
- Delete: Delete one column or delete a range of columns
- Arrows: Move columns up and down
- Cut, Copy, Paste
- Properties: This is used to open the properties window for applicable columns (formulas, count, etc.)
- Misc Info Properties: (GRW only) This will open the properties for a Sales Misc Info column
- Audit Table Column Properties: (GRW Only) This will open the properties for the Audit Table column
- Condition: This will open the window for the properties of a conditional column

- Expressions: This will allow for columns to have a background color or text based on defined conditions.
- Show/Hide Advanced (GRW only) this will display the advanced set up options of the GRW

Setting up a column

- **Column**: Select the field or type of figures you wish to display in this column. Choose blank if you want to show an empty space, which comes in handy if you want to space out columns. There are several calculated columns that are available on all reports
  - **Count:** Keeps a running count of whatever field is defined in its properties. The field must also be present on the Rows tab.
  - **Formula:** This is set up under the properties of that column
  - **% Variance:** This is set up under the properties of that column
  - **$ Variance:** This is set up under the properties of that column
  - **Audit Table Column (GRW only and is only applicable to SGA Pulse Clients):** This is used to insert the CreateUser, CreateDate, ModifyUser, or ModifyDate of a particular item in the SGA Sales system. It requires basic SQL knowledge in order to be set up. Please contact the SGA support team for further assistance.
  - **Pulse Form Column (GRW only and is only applicable to SGA Pulse Clients):** This is used to insert information from a custom form within the SGA Pulse system. It is only applicable if the query used by the report contains the MemberID and FamilyID. If you are pulling information that is stored by registration, then it will also require the RegistrationID.
  - **Pulse Agreement Column (GRW only and is only applicable to SGA Pulse Clients):** This is used to insert information from an agreement within the SGA Pulse system. It is only applicable if the query used by the report contains the MemberID and FamilyID.
- **Year:** (Financial Statements Only) If you choose a column that is an actual, budget, or encumbrance then you also need to specify the year.
- **Month:** (Financial Statements Only) If you choose a column that is an actual, budget, or encumbrance then you also need to specify the month.
- **Header**: This is what shows as the header at the top of the grid for this column. The header will word wrap if it is too big to fit in one line, depending on the column width. You can force it to word wrap by using the | (Shift + \) character. Headers are defaulted for the column you select. Click the Insert Variable button to show a list of variables that can be used in a header. You can mix variables in with regular text to your preference.
- **Hide**: Hides the column. This is useful when you need to calculate a variance or formula with data that is not an existing column. It is also useful if you want to show data in total row cells that is not an existing column.

- **Width**: Specify the width of the column. Specify “Auto” to auto-fit the column. This applies to how the report is displayed as well as printed. It does not apply when exported to Excel.
- **Conditional**: Check this to only include data in this column when a certain condition is met. For example, you might want to print a column of figures for one item only. Click the Condition button to specify the condition.
- **Align**: Specifies the text alignment of data.
- **Header Align**: Specifies the text alignment of the header.
- **Format**: Determines how amounts, numbers, and date columns are displayed. Click on the magnifying glass to view all available formats
- **Value Type**: Specifies what value is displayed. For number type columns this is typically set to Sum. For text type columns you can set it to show the first or last value. However, if the data is not summarized to begin with this is irrelevant.
  - **First**: Displays the first value found.
  - **Last**: Displays the last value found.
  - **Min**: Displays the minimum or least value found.
  - **Max**: Displays the maximum value found.
  - **Sum**: Displays a summarized total of all values.
  - **Run**: Displays a running total of the values.
- **Wrap Text**: Word wraps text only if the column width is set to a number and to “Auto”.
- **Show New Lines:**
- **Flip Sign**: For amount type columns this flips the sign, making positive numbers negative and visa-versa.
- **Border**: Displays a defined border on the left side of the column or on all sides.
- **Excel Formula**: When exporting to Excel this column will be overlaid with the specified Excel formula. Formulas must be entered in the Excel R1C1 style. For example, if you create a formula that adds the prior column (1 column to the left of this one) to a column that 3 columns to the right of this one then the formula would be “=RC[-1]+RC[+3]”. Note that every formula must begin with an equals sign and cell references must be within brackets.
- **Is Decimal**: Allows columns marked as first to have their cell values used in formulas and be considered numeric. Usually only columns marked as Run or Sun can be used in formulas.