

## General Tab Options

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Customize Report > General Tab

### General Tab of Customize Report

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


## Financial Statements

Reports > Financial Statements > Y - Balance Sheet

Report: Bal Sheet 10 years Corp by Major  

Select General Rows Columns

Description:

Font: Microsoft Sans Serif 8 

Nbr of frozen columns: 2


From Email: YMCA of Metro North - info@metr


Use Report Description: None


Exclude rows with zeros in all columns  Show true sign


Summarize Rows

Apply Account Restrictions

 Print Properties

 Excel Properties



 Schedule Report

 Schedule Log

- User Report Description: This is where you select which set of [report descriptions](#) that the report needs to use.
- Show true sign: 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 into.


## Detailed Report Writer

Reports > Detail Report Writer > General Ledger

Report:   

[Select](#) [General](#) [Rows](#) [Columns](#)

Description:

Font:   

Nbr of frozen columns:

From Email:


Report Type:


Default Timing:


Exclude rows with zeros in all columns


Summarize Rows

Apply Account Restrictions

 Print Properties

 Excel Properties

 Schedule Report

 Schedule Log

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

Report Type:

- General Ledger
- Journal Entries
- A/P Invoices
- A/P Payments
- Purchase Orders
- A/R Transactions

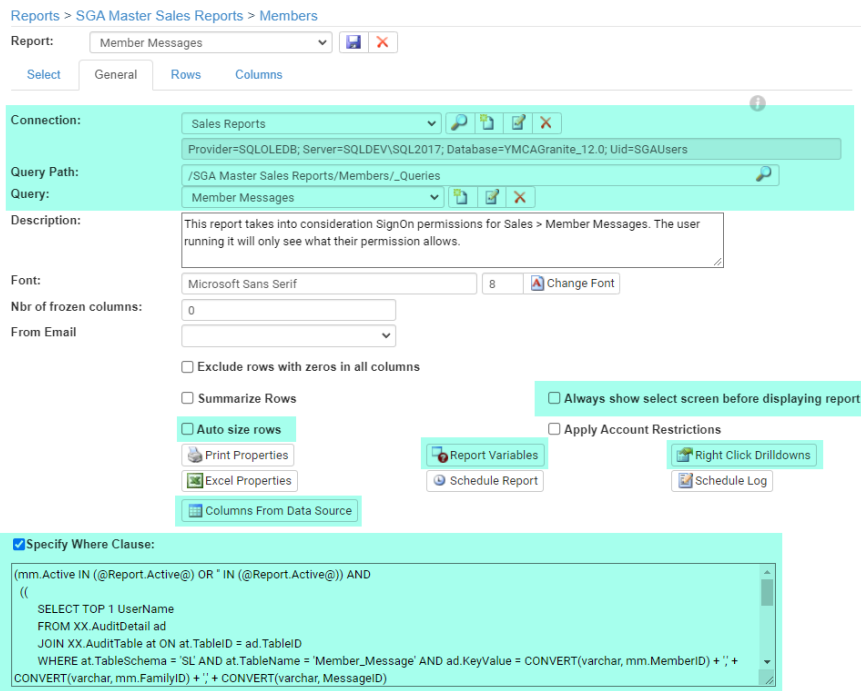
- Default Timing: Refers to the time period that report defaults to when opened.

Default Timing:

- Prior Period
- Current Period
- Prior Period
- Annual
- LTD
- LTD Current Period
- LTD Prior Period

## Generic Report Writer

*\*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 that has a basic understanding of SQL code. Contact [support@sgasoftware.com](mailto:support@sgasoftware.com) for further information.
- Auto size rows: Allows the rows to be sized as needed. Depending on the number of rows, this may slow down the generation of the report.
- \*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 set up 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 set up of the drill down paths after the report is generated. See the [Right Click Drilldowns](#) article for more information.

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## General tab options on all report writers

Select General Rows Columns

Description:

Font: Microsoft Sans Serif 8 [Change Font](#)

Nbr of frozen columns:

From Email: YMCA of Metro North - info@metr

Exclude rows with zeros in all columns

Summarize Rows

Apply Account Restrictions

[Print Properties](#)

[Excel Properties](#) [Schedule Report](#) [Schedule Log](#)

- 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.
- Exclude lines with zero amounts in all columns: Check this if you wish to include only lines with at least one amount in the columns that are defined as sum value type. If there are no lines displayed for an entire section, headings and totals will be excluded as well.
- Summarize rows: If checked, this summarizes the most detailed row on the Rows tab. If unchecked, this will always show the most detailed row regardless of what is defined on the rows tab.
- 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 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.

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## Print Properties

- General
  - o Defines how/when you want the following items printed: Gridlines, Header line, Bold headers and totals, Color/shades
  - o Line Spacing: Defined in pixels (100 pixels is approx. 1 inch)
- Page
  - o Defines page orientation, size and scale
- Margins
- Header/Footer
  - o Uses variables to define what should be printed in these areas
- Letter Head
  - o This allows for a custom letterhead to be printed at the top 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 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.
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