

Helpful Hint #3: How to Use the Include and Exclude Column Feature

The user can change the display of the output of a dashboard by including or excluding columns available in the dashboard. This is done by using the include column or exclude column feature.

To include a column:

1. Hover over any column heading (the new column will be inserted to the right of the column you are on), then right mouse button click on a column heading, a menu will appear.
2. Hover over the 'include column'.
3. Click on the name of column you wish to include.

To exclude a column:

1. Right mouse button click on the column you wish to exclude, a menu will appear.
2. Click the 'exclude column' option.

Example: To include the Account and Account Description, and exclude the Originating Agency from the default display of Account Summary>Account Summary Dashboard Page:

Default Display

Charge Agency Name	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total			3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total			3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	OTPS	Alfred State	3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

1. Include the Account column by hovering over a column (in this example we will hover over Charge Agency Name), click the right mouse button, hover over include column, click on Account.

Charge Agency Name	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total			3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State			3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State			3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6

- Sort Column >
- Keep Only >
- Remove >
- Show Subtotal >
- Show Row level Grand Total >
- Show Column level Grand Total >
- Exclude column >
- Include column >**
- Hide Column >
- Move Column >

- Account**
- Account Local Desc
- Object
- Object Sort
- Detailed Object Sort
- Detailed Object
- Sub Fund Group
- Pending Allocation

Name is equal to **Alfred State**
with **096235**

[Refresh](#) - [Print](#) - [Export](#)

2. Account number is displayed to the right of the Charge Agency Name column.

Charge Agency Name	Account	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total				3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total				3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	096235-01	DTPS	Alfred State	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	DTPS	Alfred State	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	DTPS	Alfred State	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	096235-04	DTPS	Alfred State	50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	096235-05	DTPS	Alfred State	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	DTPS	Alfred State	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	DTPS	Alfred State	325,000.00	0.00	0.00	0.00	64,973.45	260,026.55	20.0
	096235-99	DTPS	Alfred State	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

3. Repeat the process to add the account description.

Charge Agency Name	Account	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total				250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total				250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	09			1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	09			91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	09			31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	09			50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	09					0.00	0.00	0.00	0.00	100.0
	09					0.00	0.00	0.00	0.00	100.0
	096235-07	DTPS	Alfred State			0.00	0.00	64,973.45	260,026.55	20.0
	096235-99	DTPS	Alfred State			0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

4. Now the display includes the Account and Account Description.

Charge Agency Name	Account	Account Local Desc	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total					3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total					3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	096235-01	D229FE-INSTALL SAT BOILERS-PH II	DTPS	Alfred State	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	D229FG-DES-GEN REHAB-SHULTS	DTPS	Alfred State	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	D229FH-CRITICAL MAINT-MACKENZIE	DTPS	Alfred State	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	096235-04	D229FI-INFRASTRUCTURE UPGRADES	DTPS	Alfred State	50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	096235-05	D229FG-GENERAL REHAB SHULTS	DTPS	Alfred State	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	D229FU-R/C DOOR REPLACEMENT	DTPS	Alfred State	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	DTPS	Alfred State	325,000.00	0.00	0.00	0.00	64,973.45	260,026.55	20.0
	096235-99	REHAB 1213 APPROP	DTPS	Alfred State	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

- Exclude a column by hovering over the column heading and clicking the right mouse button, then click on Exclude Column.

Charge Agency Name	Account	Account Local Desc	Major Object	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total					3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total					3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	096235-01	D229FE-INSTALL SAT BOILERS-PH II	OTPS	Alfred State	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	D229FG-DES-GEN REHAB-SHULTS	OTPS	Alfred State	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	D229FH-CRITICAL MAINT-MACKENZIE	OTPS	Alfred State	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	096235-04	D229FI-INFRASTRUCTURE UPGRADES	OTPS	Alfred State	50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	096235-05	D229FG-GENERAL REHAB SHULTS	OTPS	Alfred State	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	D229FU-R/C DOOR REPLACEMENT	OTPS	Alfred State	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	OTPS	Alfred State	325,000.00	0.00	0.00	0.00	64,973.45	260,026.55	20.0
	096235-99	REHAB 1213 APPROP	OTPS	Alfred State	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

- Display now includes the Account and Account Description and excludes the Originating Agency.

Charge Agency Name	Account	Account Local Desc	Major Object	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total				3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State Total				3,250,000.00	2,750,000.00	0.00	0.00	64,973.45	435,026.55	86.6
Alfred State	096235-01	D229FE-INSTALL SAT BOILERS-PH II	OTPS	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	D229FG-DES-GEN REHAB-SHULTS	OTPS	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	D229FH-CRITICAL MAINT-MACKENZIE	OTPS	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	096235-04	D229FI-INFRASTRUCTURE UPGRADES	OTPS	50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	096235-05	D229FG-GENERAL REHAB SHULTS	OTPS	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	D229FU-R/C DOOR REPLACEMENT	OTPS	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	OTPS	325,000.00	0.00	0.00	0.00	64,973.45	260,026.55	20.0
	096235-99	REHAB 1213 APPROP	OTPS	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**
and Account begins with **096235**

The include and exclude column feature works great with the customization and setting a default customization, which will be explained in Helpful Hint #4.