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

<table>
<thead>
<tr>
<th>Charge Agency Name</th>
<th>Major Object</th>
<th>Originating Agency</th>
<th>Allocation Total</th>
<th>Expenditure Total</th>
<th>Pending Expenditure</th>
<th>Encumbrance Total</th>
<th>Pending Encumbrance</th>
<th>Available Balance</th>
<th>% Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td>3,250,000.00</td>
<td>2,750,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>64,973.45</td>
<td>435,026.55</td>
<td>86.6</td>
</tr>
<tr>
<td>Alfred State Total</td>
<td></td>
<td></td>
<td>3,250,000.00</td>
<td>2,750,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>64,973.45</td>
<td>435,026.55</td>
<td>86.6</td>
</tr>
<tr>
<td>Alfred State</td>
<td>OTPS</td>
<td>Alfred State</td>
<td>3,250,000.00</td>
<td>2,750,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>64,973.45</td>
<td>435,026.55</td>
<td>86.6</td>
</tr>
</tbody>
</table>

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

3. Repeat the process to add the account description.

4. Now the display includes the Account and Account Description.
5. Exclude a column by hovering over the column heading and clicking the right mouse button, then click on Exclude Column.

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

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