

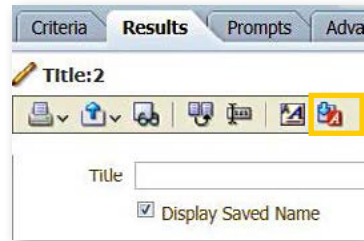
Insight Quick Reference | Format and Customize Reports

Format and customize reports to:

- Maintain consistency across reports
- Highlight data and show synopsis of data
- Make reports visually engaging and organized
- Enhance clarity of reports

Import Formatting

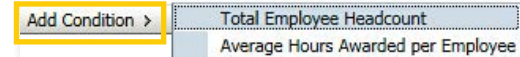
1. Click the **Import Formatting** icon from the **Results** tab of the **ad hoc report editing** page.
2. Use the Select Analysis window to navigate to the **Folders** pane and select the report with the desired format. Click **OK**.



NOTE: This option applies formatting to all the components of a report, including text.

Use Conditional Formatting

1. Click the **Edit** icon and select **Column Properties** from the **Selected Columns** pane.
2. Navigate to the **Conditional Format** tab.
3. Click **Add Condition** to apply conditional formatting to the targeted data element.
4. View the **New Condition** window to customize the conditions and values to highlight. Click **OK**.
5. View the **Edit Format** window to select the styles and formatting of how the condition will be shown in the report. Click **OK**.



Rearrange data with Formulas

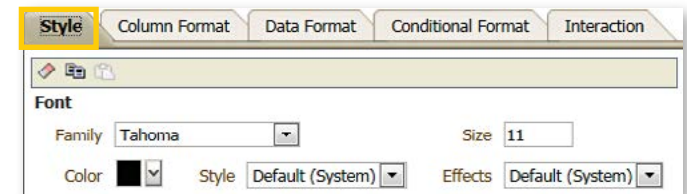
1. Navigate to the **Selected Columns** pane in the **Criteria** tab of the **ad hoc report editing** page.
 2. Click the **Edit** icon for the desired data element and select **Edit Formula**.
 3. View the **Edit Column Formula** window to customize the Column Heading and apply formulas to the column values.
 4. Click the **Custom Headings** check box to edit the Folder Heading and Column Heading.
- NOTE:** Leave the Aggregation Rule set at default.
5. Click **Column** to choose from a menu of data elements in the pane to use in the formula.
- NOTE:** Mathematical operations available appear below the **Column Formula** workspace.
6. Navigate to the Function folders. Click the desired function and click **OK**.

Column Formula

```
"Employee Profile"."NAME_EMPLOYEE_LAST"||", "||"Employee Profile"."NAME_EMPLOYEE_FIRST"||" "||"Employee Profile"."NAME_EMPLOYEE_MIDDLE"
```

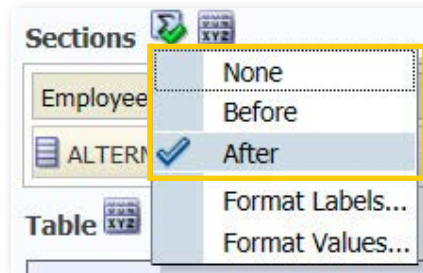
Use Styles

1. Click the **Edit** icon and select **Column Properties** from the **Selected Columns** pane.
2. View the **Column Properties** window to format the properties of the data element as it appears within the report.
3. Navigate to the **Style** tab from the **Column Properties** window.



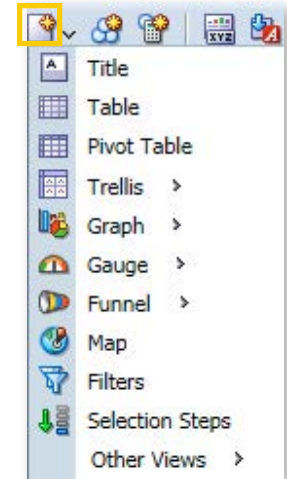
Create Sections and add a Summary Table

1. Navigate to **Sections** in the **Layout** pane to create multiple tables that are defined by a particular data element.
2. Drag and drop a data element from Columns and Measures to Sections.
3. Click the **Properties** icon to open the Section Properties window within Sections.
4. Click the **Display Heading** check box to display the data element name in the section title.
5. Click the Sections Totals icon to view a menu of options that add and customize Totals in Sections.



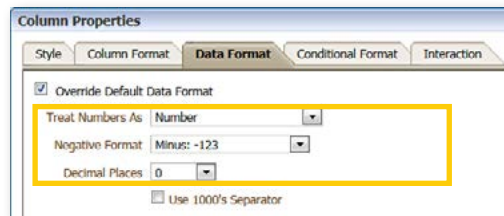
Add Context

1. Navigate to the **Results** tab of the **ad hoc report editing** page.
2. Click the **New View** icon to view a drop-down menu of additional report components. Choose from the following components:
 - **Title:** Adds a title to the report and/ or indicates the date and time a report is run.
 - **Filters:** Records a list of filters applied to the report.
 - **Static Text:** Includes a text component to the report.



Format data

1. Click the **Edit** icon and select **Column Properties** from the **Selected Columns** pane.
2. Navigate to the Data Format tab from the Column Properties window.
3. Check the **Override Default Data Format** box.
4. Select an option from the Treat Number As, Negative Format, and Decimal Places drop down menus to format data.



Sort data

1. Click the **Edit** icon for the targeted data element from the **Selected Columns** pane.
2. Select **Sort** in the drop-down menu to select from the available sorting options.

