

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

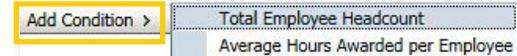
1. Click the **Import Formatting** icon from the **Results** tab of the **ad hoc report editing** page.
2. Use the Select Analysis window to navigate to the **Folders** pane and select the report with the desired format. Click **OK**.



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.

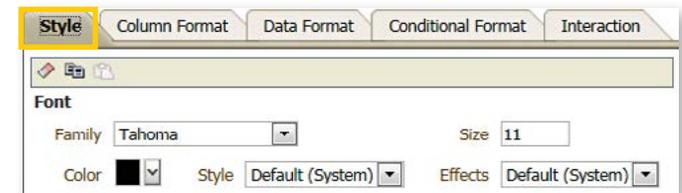
5. Click **Column** to choose from a menu of data elements in the pane to use in the formula.
6. Navigate to the **Function** folders. Click the desired function and click **OK**.

Column Formula

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

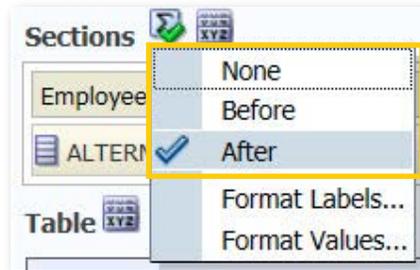
Use Styles

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.



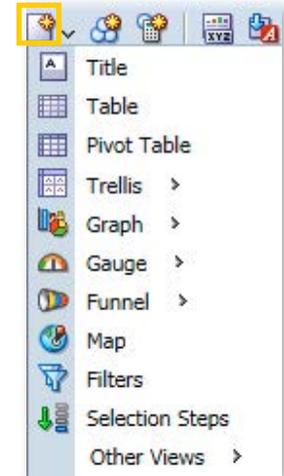
Create Sections and add a Summary Table

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.



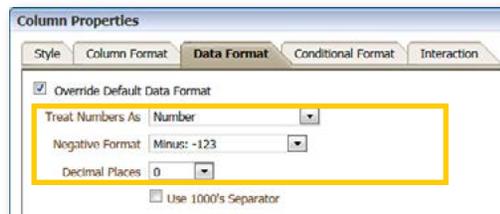
Add Context

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.

