# How to Use Insight Reports Quick Edit Tool

Quick Edit in InSight is a powerful feature that allows users to easily apply temporary filters to their existing reports. What sets InSight Quick Edit apart from many other reporting systems is its flexibility—it lets users select filters from a wide range of available fields that are part of the report's underlying tables. To illustrate, consider an Enrollment List report as an example, which typically draws data from multiple tables like Branch, Client, Assignment, Course, and Section. In InSight Quick Edit, nearly every field within these tables can be used as a filter, providing extensive customization options.

1. Please open your preferred web browser and go to the following URL:
   https://laguardia.xendirect.com/login
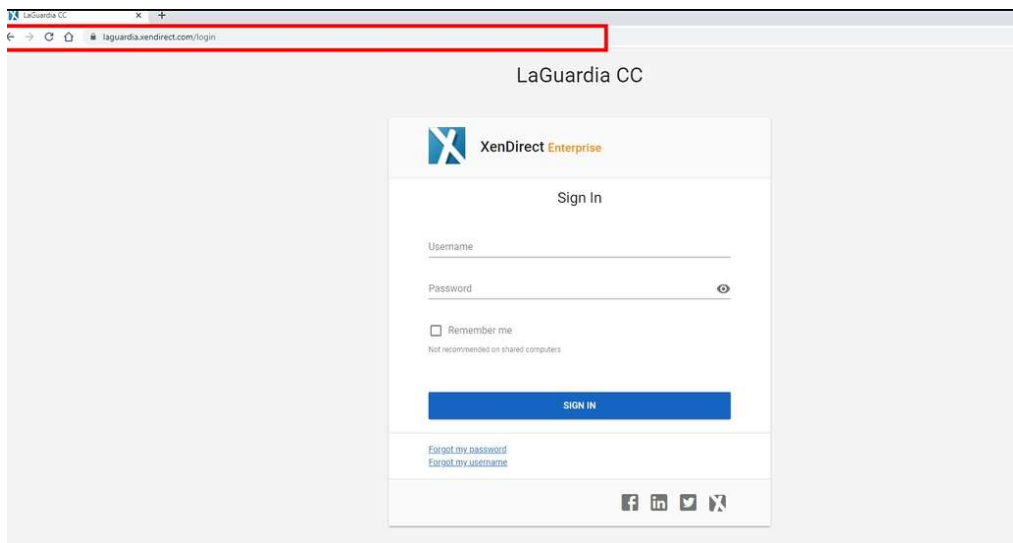
   a. If you do not have credentials please contact your program manager as they will provide credentials for you to login via e-mail.

2. Once logged select **Insight** on the left side menu
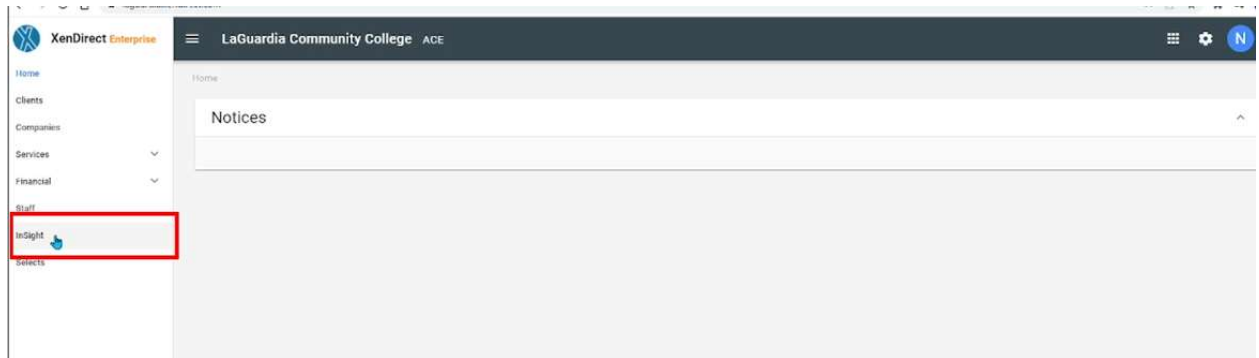
3. The left side will display a list of available reports according to your program.
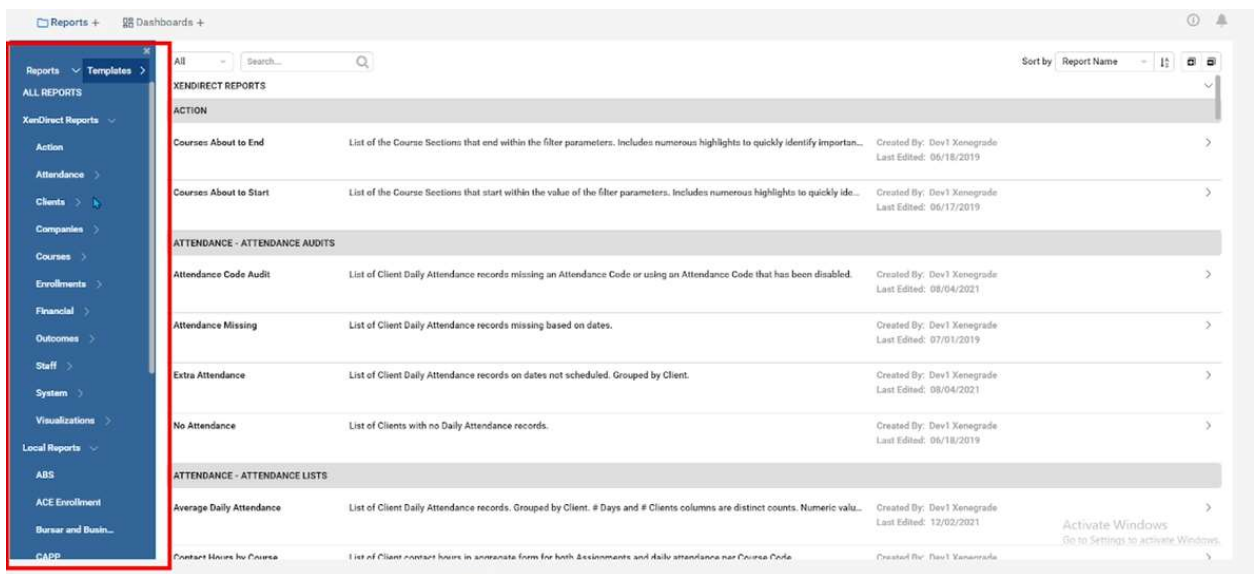
   a. If you do not have access to a report please contact your program manager or director for access.

4. You may need to scroll on the left side list to see your respective program.

     a. If you do not have access to a report please contact your program manager or director for access.

5. Select the report from the list.

6. The report will display all registrations by default.

    a. Please note that some reports may take time load due to the amount of information the report is trying to display.

7. To get to the Quick Edit window, open the report and click the **Edit → Quick Edit** button on the top right of the report.

8. The Quick Edit Mode will be enabled and you will be able to add temporary filters with permanently changing the report. Press on the PLUS sign (+) on the top right side of the report.


9. You will be prompted to select the fields and you can select multiple filters with the checkbox and press ok.
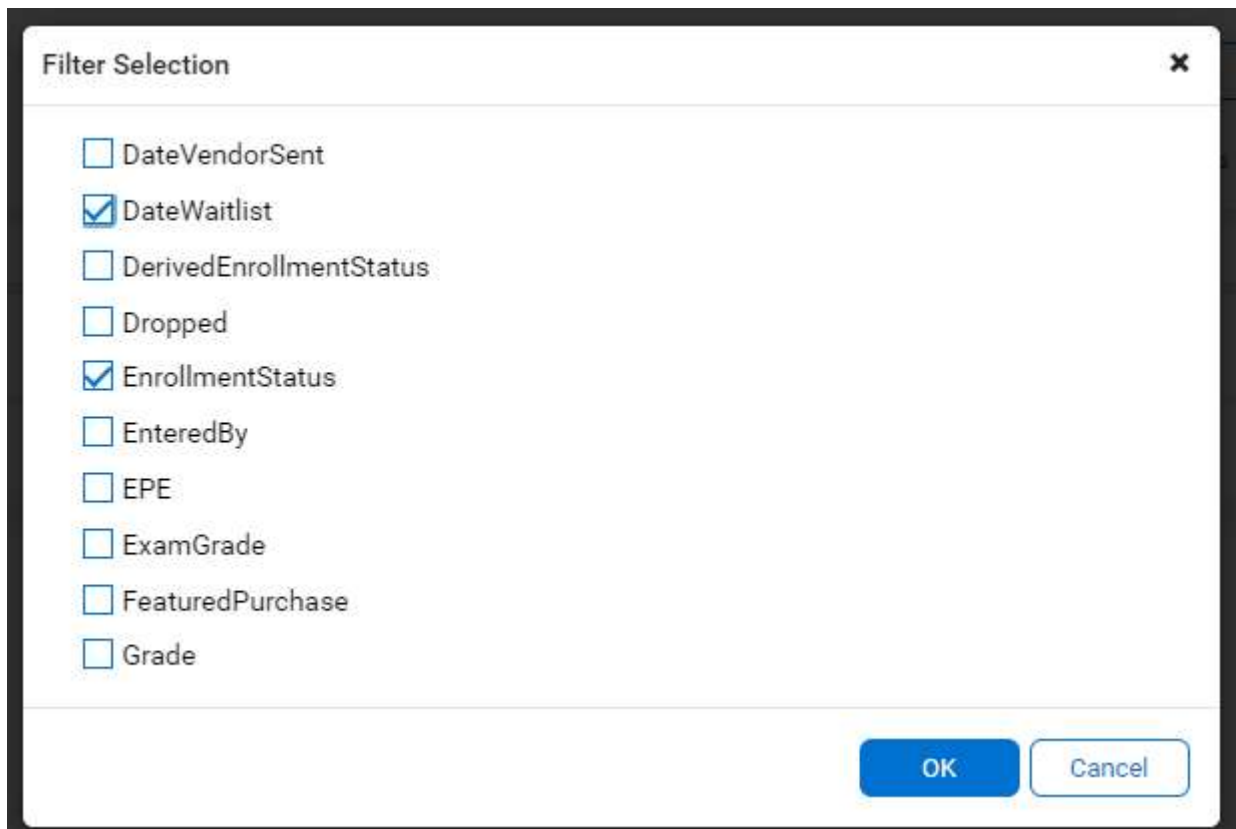
10. The filters will be listed and you can press Apply filter to confirm the changes.
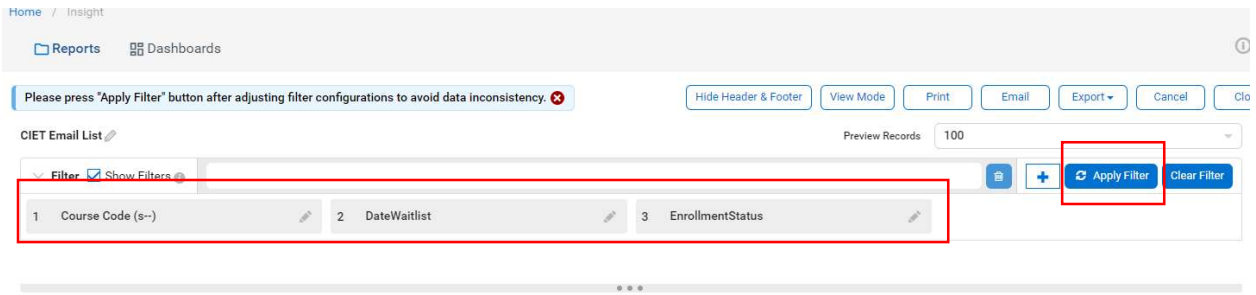
11. When you select a filter you can alter the specific filter properties depending on your needs. Select the printer and select the gear icon to access the filter properties.
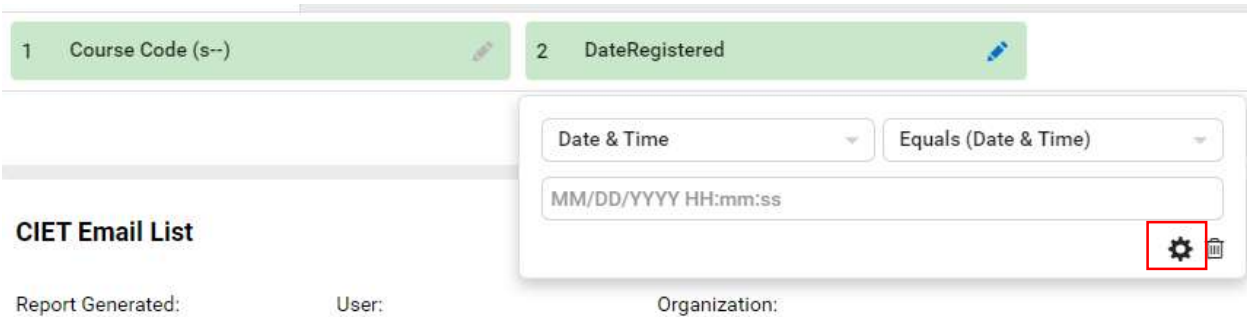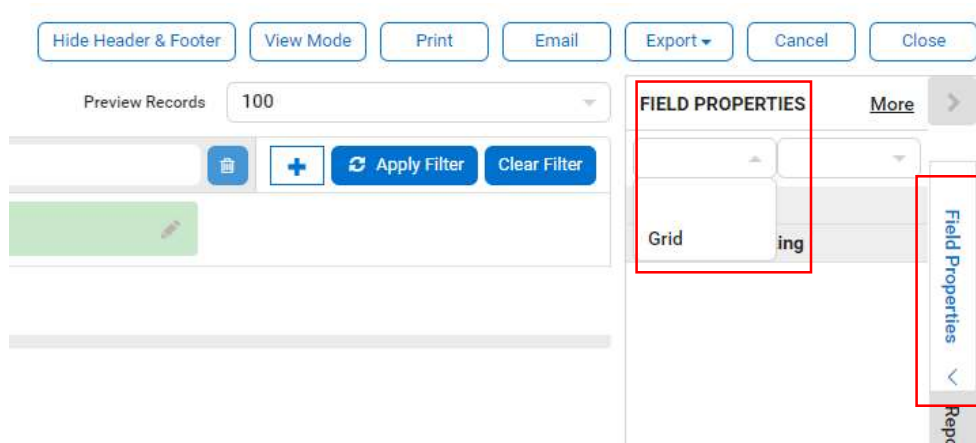

12. You will be able to see the properties window and alter the parameters based on your needs to display and press OK and apply the filter for the filter to be updated.
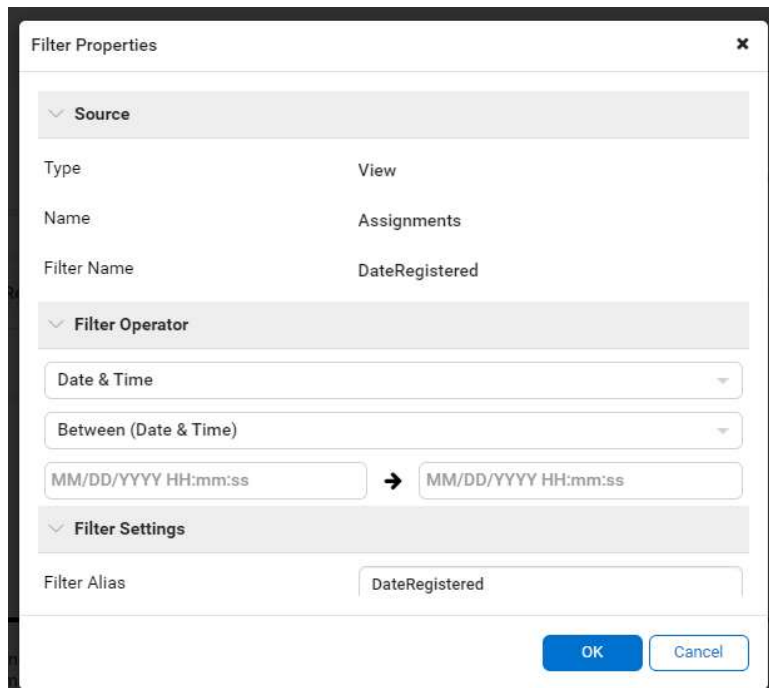
13. If you would like to remove the filter just select the filter and once the properties display you can select the trash bin icon to remove the filter an add the filter again if necessary.
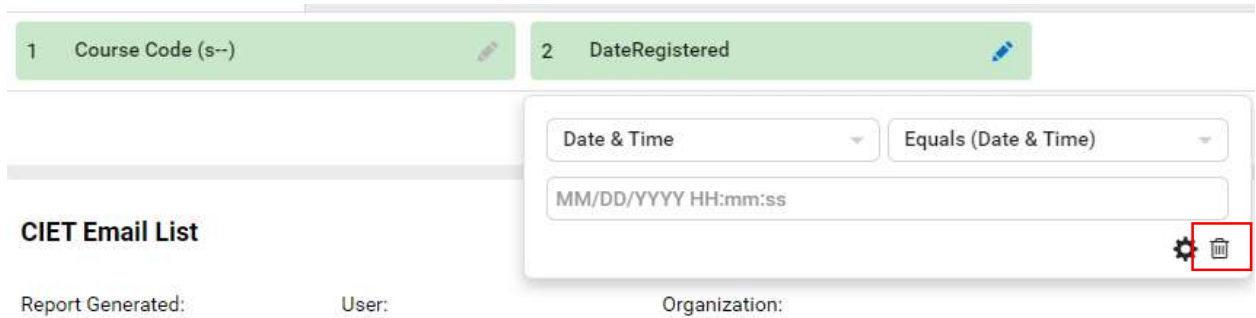
14. If you would like to add columns to display additional information or use separators to sort the report differently. Go to the right side of the form select **Field Properties** and on the drop down menu select **Grid**.


15. The configuration option will display to left side of the report results and you will be able to see the columns and separators already in use and include additional by pressing the plus signs for each on the right side.
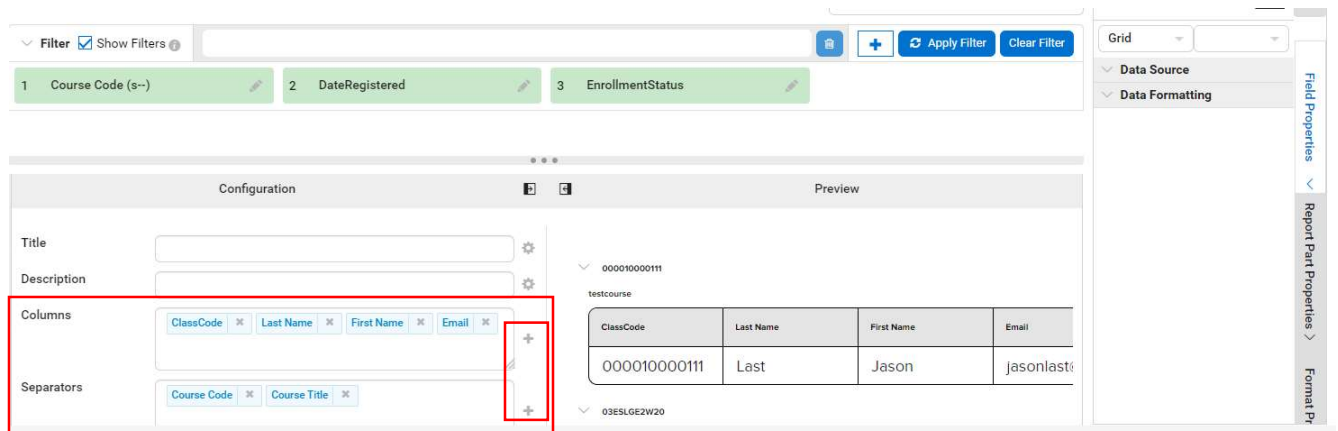
16. Just select the additional columns or separators as needed and press OK and apply the report for the filter to be updated.
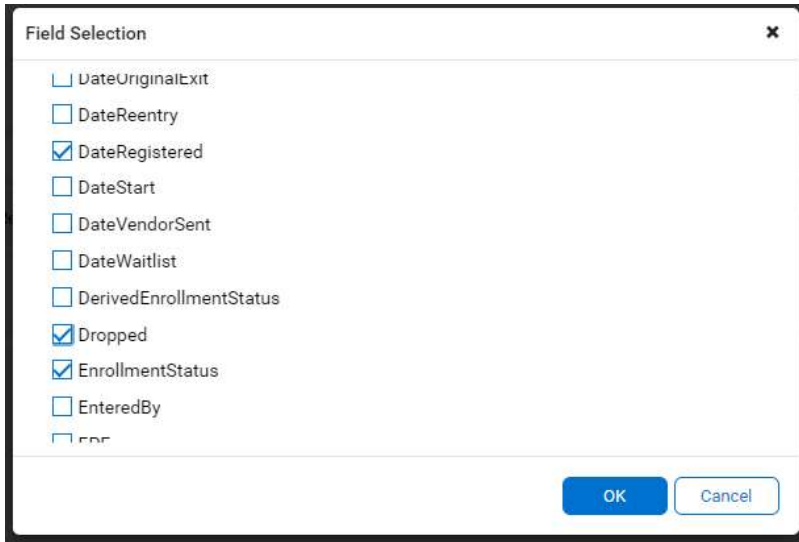
17. If you would to remove a column or separator you can return to the grid properties and remove each column or separator by pressing the **X** on each and apply the filter for the report to be updated.
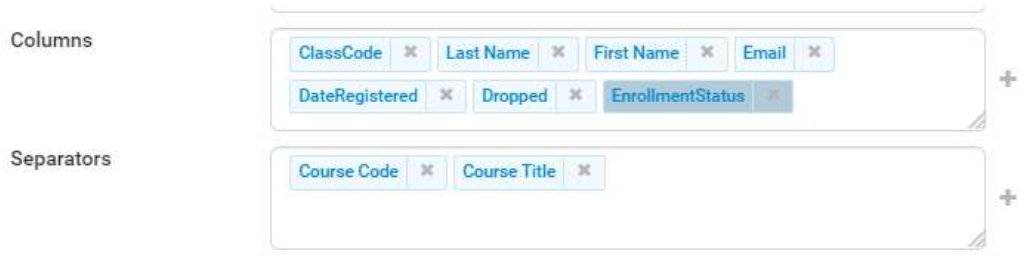
18. If you would like to view date formats differently you can update filters based on dates
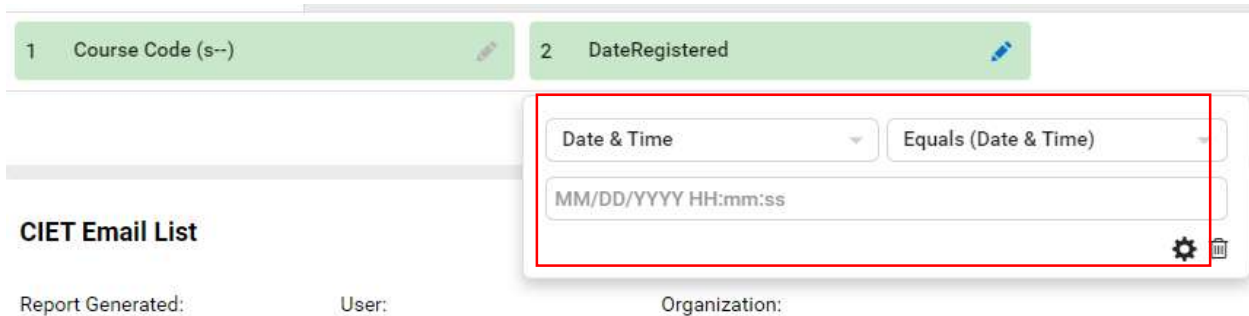
19. Select the parameter and apply the filter for the filter to be updated.

20. Also the report column format date and time fields can be updated select **Field Properties** and on the drop down menu select **Grid** and select the column.

21. Select the format and change the date according to your needs.

22. The date format will update immediately and you can view the results and change it as much as you need.

23. Please keep in mind that the changes made are not permanent and the moment you exit the report all changes will be reverted to the original format and you will need to make them again.

For further info, please visit the Xendirect Knowledge Base page:

https://rise.articulate.com/share/ir2xKjYXloYwZ_erZse-fb7ogXxYAebM#/