

DARE TO DO MORE

## 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: <u>https://laguardia.xendirect.com/login</u>

LaGuardia CC
XenDirect Enterprise
Sign In
Username
Password O
Remember me Not recommended on shared computers
SIGN IN
Eargot my Jassimord Eargot my Lasemanne
fin 🖬 🕅

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

XenDirect Enterprise	⊒ LaGuardia Community College ACE	=	٠	N
Home	Nome			
Clients Companies	Notices			^
Services 🗸				
Financial $\sim$				
Staff				
InSight 👆				
Selects				

3. The left side will display a list of available reports according to your program.

Reports + gg Da	ashboards +			(	0
o rts             Templates     >	All - Search	Q		Sort by Report Name - 12	8
EPORTS	XENDIRECT REPORTS				
rect Reports 🖂	ACTION				
tion	Courses About to End	List of the Course Sections that end within the filter parameters. Includes numerous highlights to quickly identify importan	Created By: Dov1 Xenegrade Last Edited: 06/18/2019		
endance >	Courses About to Start	List of the Course Sections that start within the value of the filter parameters. Includes numerous highlights to quickly ide	Created By: Dev1 Xenegrade Last Edited: 06/17/2019		
npanles >	ATTENDANCE - ATTENDANCE AUD	rrs			
olimenta 🔿	Attendance Code Audit	List of Client Daily Attendance records missing an Attendance Code or using an Attendance Code that has been disabled.	Created By: Dev1 Xenegrads Last Edited: 08/64/2021		
oomes >	Attendance Missing	List of Client Daily Attendance records missing based on dates.	Created By: Dev1 Xenegrade Last Edited: 07/01/2019		
ff >	Extra Attendance	List of Client Daily Attendance records on dates not scheduled, Grouped by Client.	Created By: Dev1 Xenegrade Last Edited: 08/04/2021		
elizations >	No Attendance	List of Clients with no Daily Attendance records.	Created By: Dev1 Xenegrade Last Edited: 06/18/2019		
	ATTENDANCE - ATTENDANCE LIST	8			
Enrollment	Average Daily Attendance	List of Client Daily Attendance records. Grouped by Client. # Days and # Clients columns are distinct counts. Numeric valu	Created By: Dev1 Xenegrade Last Edited: 12/02/2021	Activate Windows Go to Settings to activate We	
PP	Contact Hours by Course	List of Cliant contact hours in anoranate form for both Sesimments and daily attendance her Course Code	Orested By: Day1 Xanastrada		

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.

E LaGuardia Commu	Inity College ACE			≡	۵	
iome / Insight						
CReports + BB Dash	nboards +				()	ą
X Reports V Templates X Visualizations X	All Search XENDIRECT REPORTS	Q	Sort by Report Name	- 1 <u>*</u>		•
Local Reports 🖂	ACTION					
ABS ACE Enroliment	Courses About to End	List of the Course Sections that end within the filter parameters. Includes numerous highlights to quickly identi	Created By: Dev1 Xenegrade Last Edited: 06/18/2019			>
Bursar and Busin CAPP	Courses About to Start	List of the Course Sections that start within the value of the filter parameters. Includes numerous highlights to	Created By: Dev1 Xenegrade Last Edited: 06/17/2019			>
CIET	ATTENDANCE - ATTENDANCE AUD	ITS				
CLIP Course Lists	Attendance Code Audit	List of Client Daily Attendance records missing an Attendance Code or using an Attendance Code that has bee	Created By: Dev1 Xenegrade Last Edited: 08/04/2021			>
CTEA	Attendance Missing	List of Client Daily Attendance records missing based on dates.	Created By: Dev1 Xenegrade Last Edited: 07/01/2019			>
FATHERHOOD	Extra Attendance	List of Client Daily Attendance records on dates not scheduled. Grouped by Client.	Created By: Dev1 Xenegrade Last Edited: 08/04/2021			>
Marketing PDA IEP	No Attendance	List of Clients with no Daily Attendance records.	Created By: Dev1 Xenegrade Last Edited: 06/18/2019			>
PreHospital Heal	ATTENDANCE - ATTENDANCE LIST	s				
TELC >			n			s.

- 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.

e / Insight				
🗀 Reports + 🛛 🔠 Dash	nboards +			0
× ports	All · Search	Q)	Sort by Report Name	- 1 <u>4</u> 0 6
Visualizations	XENDIRECT REPORTS			~
al Reports 🗸	ACTION			
ABS ACE Enrollment	Courses About to End	List of the Course Sections that end within the filter parameters. Includes numerous highlights to quickly identi	Created By: Dev1 Xenegrade Last Edited: 06/18/2019	>
Bursar and Busin CAPP	Courses About to Start	List of the Course Sections that start within the value of the filter parameters. Includes numerous highlights to	Created By: Dev1 Xenegrade Last Edited: 06/17/2019	>
CIET	ATTENDANCE - ATTENDANCE AUE	SLIC		
CLIP Course Lists	Attendance Code Audit	List of Client Daily Attendance records missing an Attendance Code or using an Attendance Code that has bee	Created By: Dev1 Xenegrade Last Edited: 08/04/2021	>
CTEA	Attendance Missing	List of Client Daily Attendance records missing based on dates.	Created By: Dev1 Xenegrade Last Edited: 07/01/2019	>
FATHERHOOD	Extra Attendance	List of Client Daily Attendance records on dates not scheduled. Grouped by Client,	Created By: Dev1 Xenegrade Last Edited: 08/04/2021	>
Marketing PDA IEP	No Attendance	List of Clients with no Daily Attendance records.	Created By: Dev1 Xenegrade Last Edited: 06/18/2019	>
PreHospital Heal	ATTENDANCE - ATTENDANCE LIST			

6. The report will display all registrations by default.

≡ LaGuardia Community College ACE			≡ ≎ 🤳
Home / Insight			
□ Reports + B Dashboards +			0
		Hide Header & Footer	Subscribe Print Email Export • Edit • Save As Cancel Close
Courses About to End			Preview Records 0000 ~
✓ Filters			Clear Filter
Course Date End	Course Status		
Courses About to End			
Report Generated: User:	Organization:		
08/01/2023 02:11:21 PM	LaGuardia CC		
2			
InSight Menu >> Action >> Courses About to End List of the Course Sections that end within the filter parameters. In	includes numerous highlights to guickly identif	v important information.	
Report Filter Info:		,,	
1 Course Date End = This Week 2 Course Status = Completed, Offered			
2 Course Status = Completed, Orfered			
🔗 Monday, July 31, 2023			
	Enrolle	Balances	
Course Code V Course Title Date Stort	Course Status d Instructor 1	Instructor 2 Due	
MEDB000U23.605.05.00 Medicel Billing Informatio 07/31/2023	Offered 50 TED. TED	0.00	

- a. Please note that some reports may take time load due to the amount of information the report is trying to display.
- To get to the Quick Edit window, open the report and click the Edit → Quick Edit button on the top right of the report.

		① Å
Hide Header & Footer Print	Export - Edit - Quick Edit	Cancel Close
Treview		pply Filter Clear Filter
ollment Status		

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.

		Hide Header & Footer     View Mode     Print     Email     Export +     Cancel     Ck
CIET Email List 🧷		Preview Records 100
✓ Filter		a Apply Filter Clear Filter
1 Course Code (s)	1	

9. You will be prompted to select the fields and you can select multiple filters with the checkbox and press ok.

Filter Selection	×
DateVendorSent	
🗹 DateWaitlist	
DerivedEnrollmentStatus	
Dropped	
EnrollmentStatus	
EnteredBy	
EPE EPE	
ExamGrade	
FeaturedPurchase	
Grade	
	OK Cancel

10. The filters will be listed and you can press Apply filter to confirm the changes.

Home / Insight			
C Reports Dashboards			(
Please press "Apply Filter" button after adjusting filte	er configurations to avoid data inconsistency. 😢	Hide Header & Footer View Mode Prin	nt Email Export - Cancel Clo
CIET Email List 🧷		Preview Records	100 ~
V Filter Show Filters			Apply Filter     Clear Filter
1 Course Code (s)	2 DateWaitlist	/ 3 EnrollmentStatus /	
		0.0.0	

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.

1 Course Code (s)	1	2 DateRegistered	1
		Date & Time	← Equals (Date & Time) ←
		MM/DD/YYYY HH:mm:ss	
CIET Email List			<b>‡</b>
Report Generated:	User:	Organization:	

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.

17
YY HH:mm:ss

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.

1 Course Code (s)	1	2 DateRegistered	1
		Date & Time	✓ Equals (Date & Time)
		MM/DD/YYYY HH:mm:ss	
CIET Email List			<b>\$</b> 🖻
Report Generated:	User:	Organization:	

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**.

Hide Header & Footer View Mode Print Email	Export - Cance		ose
Preview Records 100 -	FIELD PROPERTIES	More	>
🗎 🛨 🞜 Apply Filter Clear Filter	-)	-	_
1	Grid ing		Field
			Field Properties
			erties
			<
		L	

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.

✓ Filter ☑ Show Filt	ers 🕜					•	C Apply Filter	Clear Filter	Grid		- • ) r
			1.						🗸 Data Se	ource	
1 Course Code (s)	2 DateRegistered	d.	3	EnrollmentStatus	1				🗸 Data Fo	ormatting	
		0.0	•								
	Configuration	Þ	•			Preview					
Title Description				000010000111							
		<i>\\\\</i>	1	testcourse							
Columns	ClassCode X Last Name X First Name X Emai	1 × +		ClassCode	Last Name	Fi	rst Name	Email			
Separators		_		000010000111	Last	J	ason	jasonlast@			
Separators	Course Code X Course Title X	+		V 03ESLGE2W20							

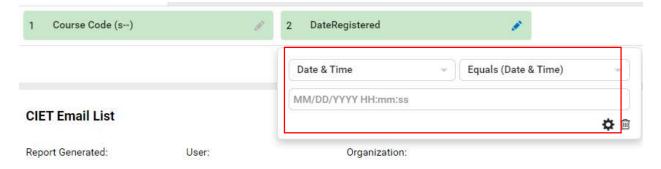
16. Just select the additional columns or separators as needed and press OK and apply the report for the filter to be updated.

1	Field Selection	×
	L DateOriginalExit	
	DateReentry	
	☑ DateRegistered	
	DateStart	
	DateVendorSent	
	DateWaitlist	
	DerivedEnrollmentStatus	
	☑ Dropped	
	Z EnrollmentStatus	
	EnteredBy	
	ок	Cancel

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.

Columns	ClassCode X Last Name X First Name X Email X	
	DateRegistered X Dropped X EnrollmentStatus	+
Separators	Course Code X Course Title X	+
		A

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.

2 DateRegistered		
Date & Time MM/DD/YYYY HH:mm	*)( :ss	Between (Date & Time)
Dulcie	DDavid	Not Blank Null
Selahattin	hkartal	Not Null Between (Date)
Jane	janed@	Between (Date & Time)
Brett	gschre	Between (Time)

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.

	Preview	v Records 100		FIELD PROPE	RTIES More
		<b>a</b> +	2 Apply Filter Clear Filte	Grid	- DateReg
3 Enrollment	Status	-		🗸 Data Sour	ce
5 Enforment	Status	1. A.		Field Name	DateRegistered
. [				Field Name Alias	DateRegistered
Č.	DateRegistered	Dropped	EnrolimentStatus	🖂 Data Form	natting
onlast@gm	2020	No	Enrolled/Active	Function	Group -
ondstøgni	2020			Format	Year -
				Width	Pixel
0	DateRegistered	Dropped	EnrollmentStatus	Word Wrap	
rcario@lag	2020	No	Enrolled/Active	Sort	11
artal@lagc	2020	No	Enrolled/Active	SubTotal	\$

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

FIELD PROPER	TIES	More	>
Grid +	 Short Date	2	
V Data Source	MM/dd	/yy	F
Field Name	M/d/yy	уу	eld Pr
Field Name Alias	MM/dd M/d/yy		Field Properties
💛 Data Forma	MM-yy		<
Function	М-уу		Rep
Format	Year	-	ort Pa
Width		Pixel	rt Prop
Word Wrap			Report Part Properties
Sort (	11		×
SubTotal	*		Format Pr
Crond Total	×		t Pr

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

3 Enrollments	Status	1		✓ Data Sour	ce
5 Enternet	Juno			Field Name	DateRegistered
				Field Name Alias	DateRegistered
	1	1	1	💛 Data Form	atting
ail	DateRegistered	Dropped	EnrollmentStatus	Function	Group -
sonlast@gm	03/11/2020	No	Enrolled/Active	Format	MM/dd/y
				Width	Pixel
ail	DateRegistered	Dropped	EnrolimentStatus	Word Wrap	( <b>=</b> )
	Datenegistered	Dropped	Enroimentstatus	Sort	11
arcario@lag	03/02/2020	No	Enrolled/Active	SubTotal	•
kartal@lagc	03/02/2020	No	Enrolled/Active		

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#/