

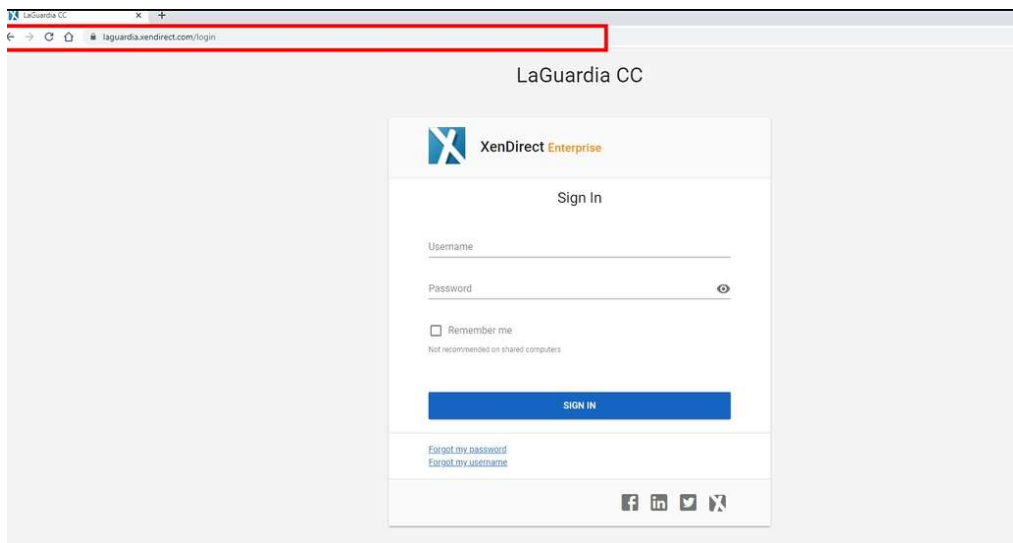


DARE TO DO MORE

How to Use Insight Reports Quick Edit Tool

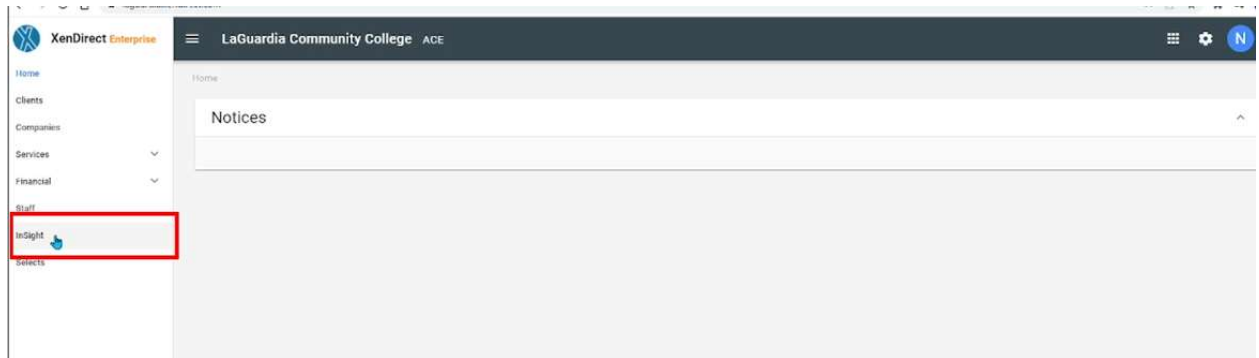
Quick Edit in InSight is a powerful feature that allows users to easily apply temporary filters to their existing reports. What sets InSight Quick Edit apart from many other reporting systems is its flexibility—it lets users select filters from a wide range of available fields that are part of the report's 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:
<https://laguardia.xendirect.com/login>

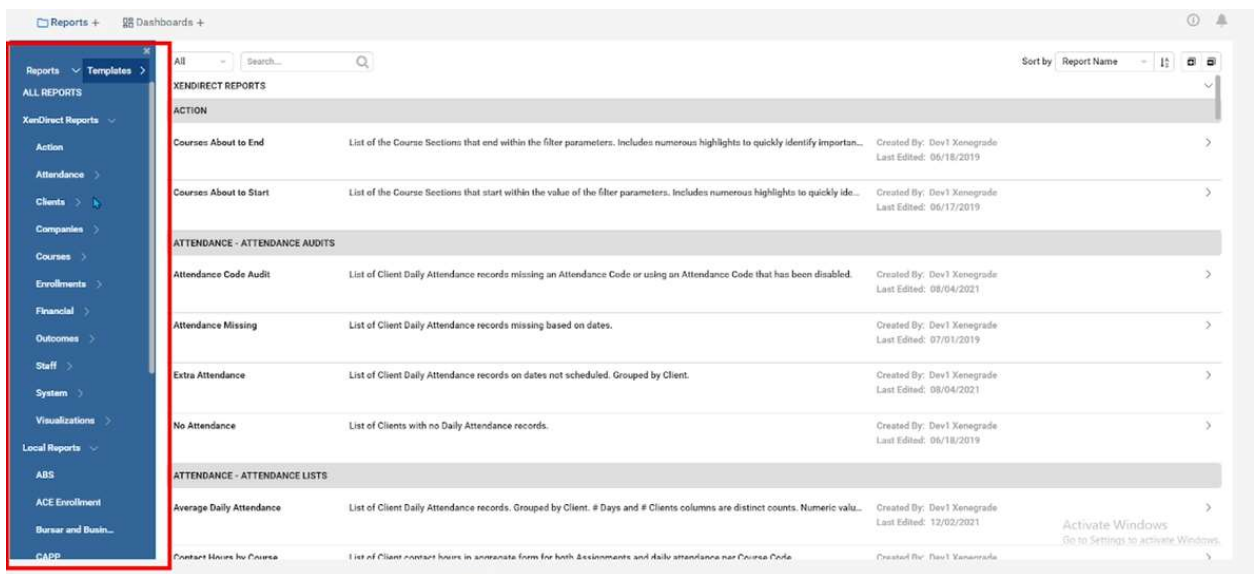


- a. If you do not have credentials please contact your program manager as they will provide credentials for you to login via e-mail.

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.

The screenshot shows the LaGuardia Community College ACE Reports interface. The left sidebar menu is highlighted with a red box, listing various programs. The main content area displays a list of reports under the heading 'XENDIRECT REPORTS'. The reports are organized into sections: 'ACTION' (Courses About to End, Courses About to Start), 'ATTENDANCE - ATTENDANCE AUDITS' (Attendance Code Audit, Attendance Missing, Extra Attendance, No Attendance), and 'ATTENDANCE - ATTENDANCE LISTS'. Each report entry includes a title, a brief description, and the creator/last editor information.

- 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.

This screenshot is identical to the previous one, showing the LaGuardia Community College ACE Reports interface. However, a red box highlights the entire main content area, including the search bar, the 'XENDIRECT REPORTS' heading, and the list of reports under the 'ACTION', 'ATTENDANCE - ATTENDANCE AUDITS', and 'ATTENDANCE - ATTENDANCE LISTS' sections.

6. The report will display all registrations by default.

LaGuardia Community College ACE

Home / Insight

Reports + Dashboards +

Hide Header & Footer | Subscribe | Print | Email | Export | Edit | Save As | Cancel | Close

Preview Records 1000

Filters

Course Date End | Course Status

Courses About to End

Report Generated: 08/01/2023 02:11:21 PM | User: Jason Clements | Organization: LaGuardia CC

InSight Menu >> Action >> Courses About to End
List of the Course Sections that end within the filter parameters. Includes numerous highlights to quickly identify important information.

Report Filter Info:
1 Course Date End = This Week
2 Course Status = Completed, Offered

Monday, July 31, 2023

Course Code	Course Title	Date Start	Course Status	Enroll ed	Instructor 1	Instructor 2	Balances Due
MECB000U23 605.05.00	Medical Billing Informa...	07/31/2023	Offered	50	TED, TBD		0.00

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.

Hide Header & Footer | Print | Email | Export | **Edit** | Cancel | Close

Preview Records 100

Quick Edit

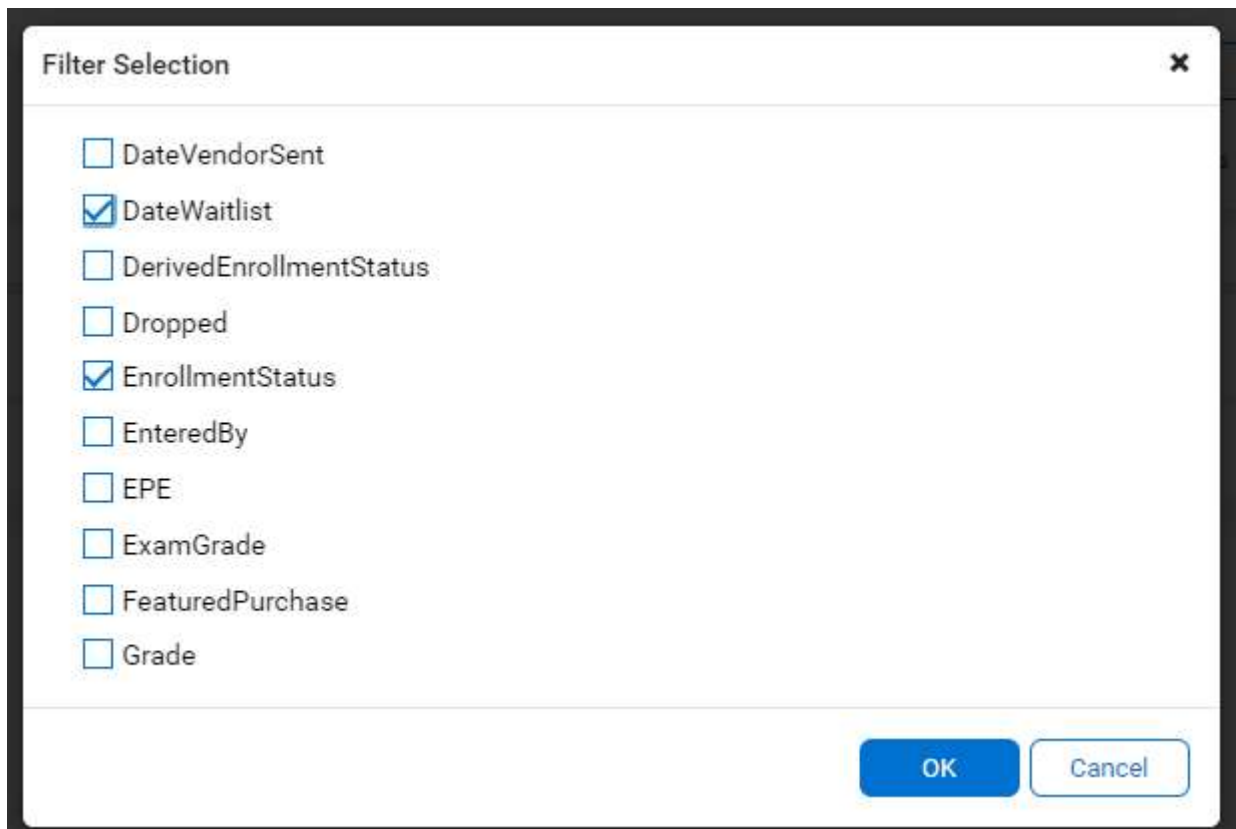
Apply Filter | Clear Filter

Enrollment Status

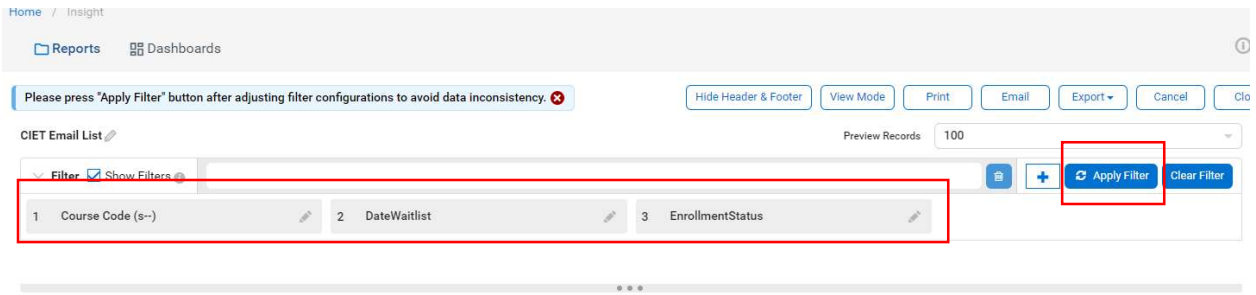
- The Quick Edit Mode will be enabled and you will be able to add temporary filters with permanently changing the report. Press on the PLUS sign (+) on the top right side of the report.



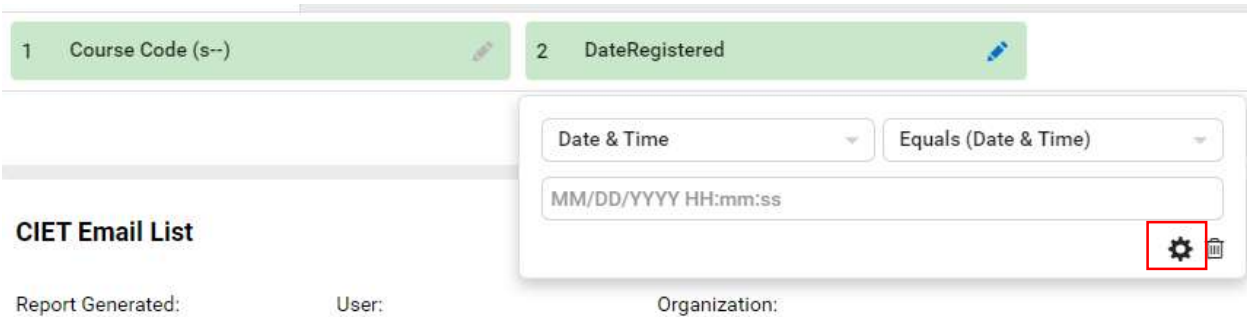
- You will be prompted to select the fields and you can select multiple filters with the checkbox and press ok.



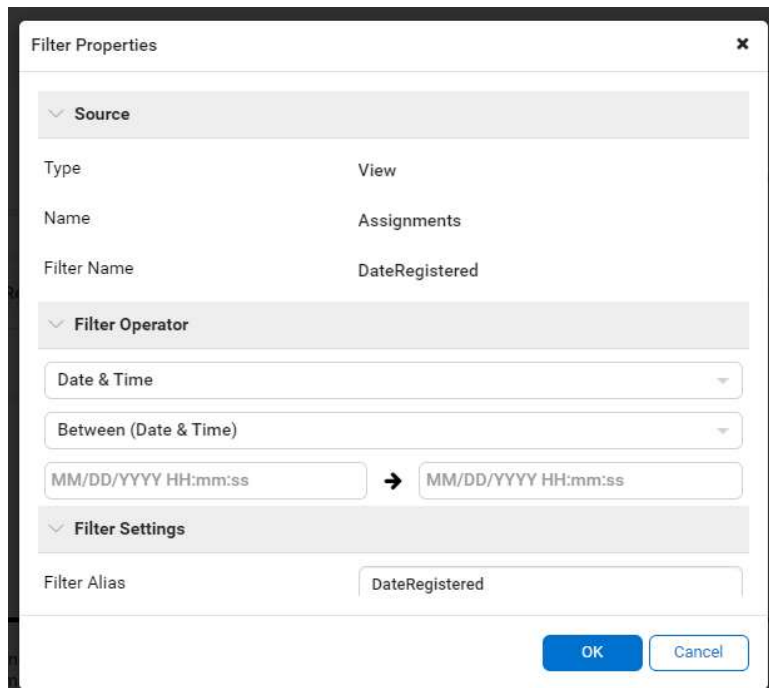
10. The filters will be listed and you can press Apply filter to confirm the changes.



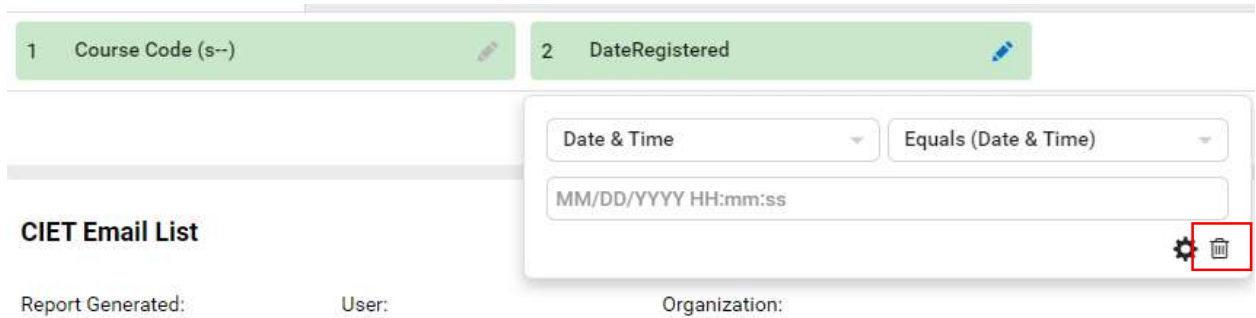
11. When you select a filter you can alter the specific filter properties depending on your needs. Select the printer and select the gear icon to access the filter properties.



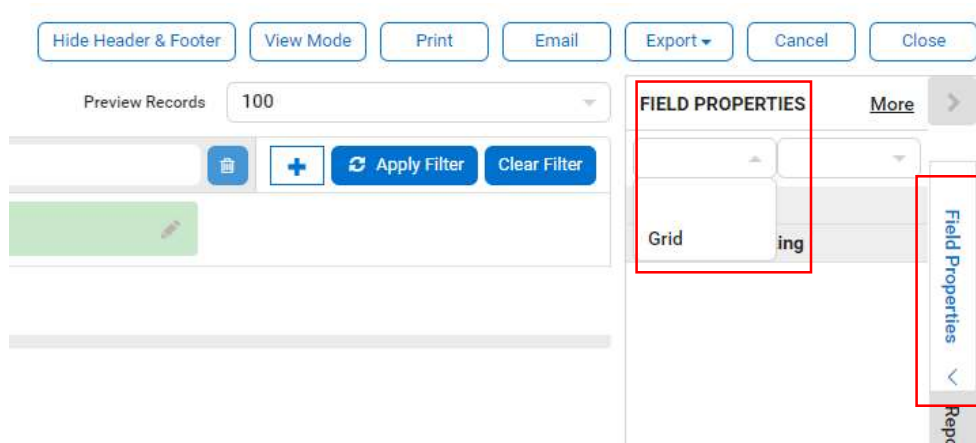
12. You will be able to see the properties window and alter the parameters based on your needs to display and press OK and apply the filter for the filter to be updated.



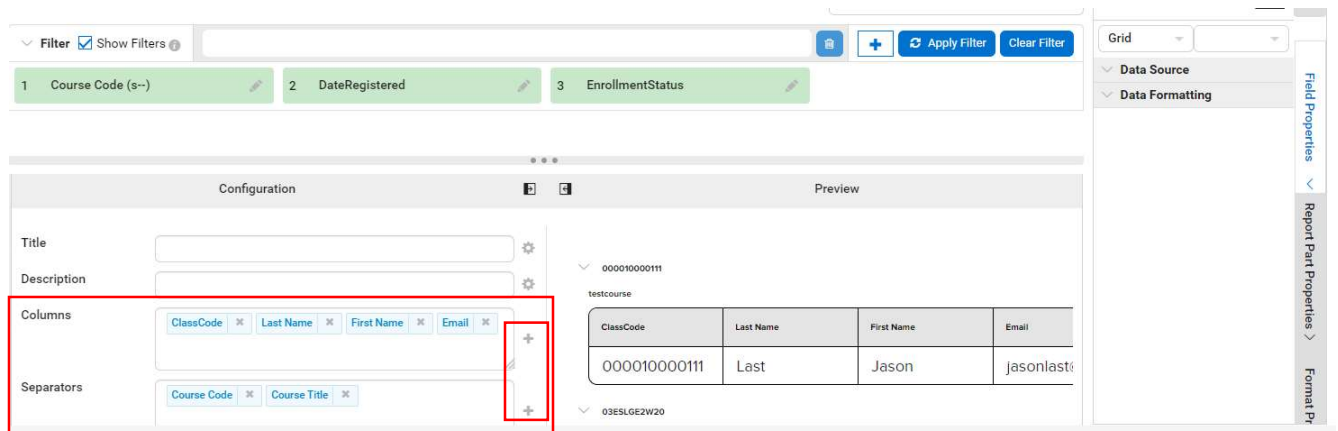
13. If you would like to remove the filter just select the filter and once the properties display you can select the trash bin icon to remove the filter and add the filter again if necessary.



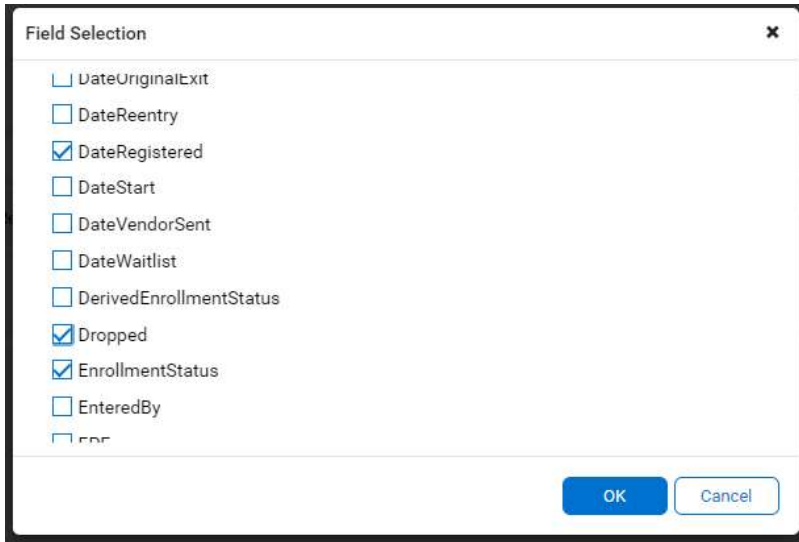
14. If you would like to add columns to display additional information or use separators to sort the report differently. Go to the right side of the form select **Field Properties** and on the drop down menu select **Grid**.



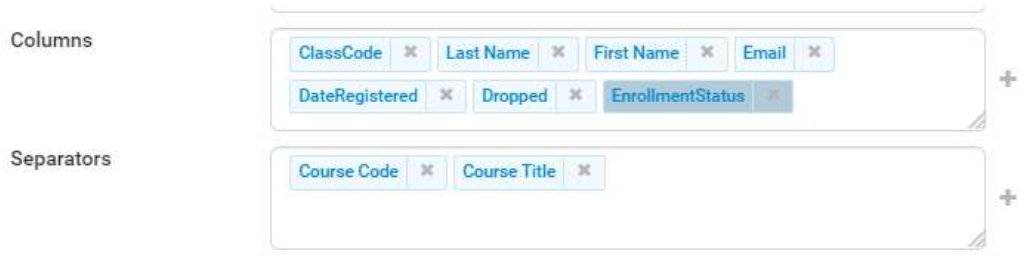
15. The configuration option will display to left side of the report results and you will be able to see the columns and separators already in use and include additional by pressing the plus signs for each on the right side.



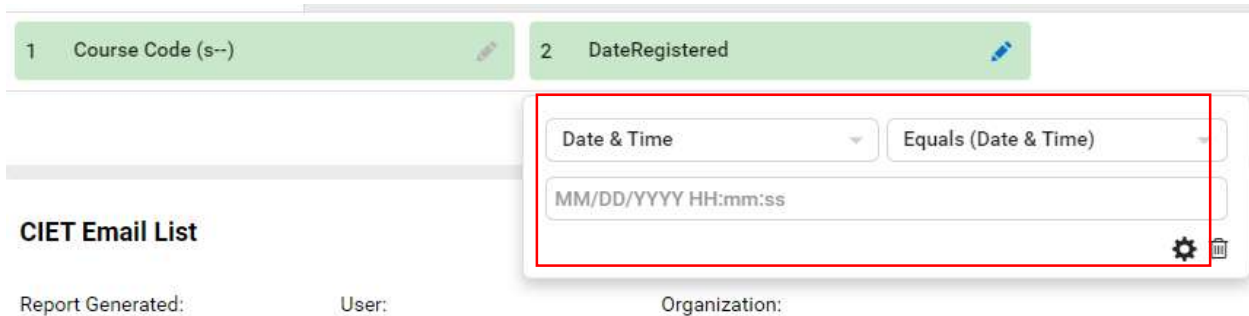
16. Just select the additional columns or separators as needed and press OK and apply the report for the filter to be updated.



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.

Name	Email
Dulcie	DDavie
Selahattin	hkartal
Jane	janed@
Brett	gschre

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.

all	DateRegistered	Dropped	EnrollmentStatus
sonlast@gm...	2020	No	Enrolled/Active
arcario@lag...	2020	No	Enrolled/Active
kartal@lagc...	2020	No	Enrolled/Active

FIELD PROPERTIES [More](#)

Grid DateReg...

Data Source

Field Name DateRegistered

Field Name Alias DateRegistered

Data Formatting

Function Group

Format Year

Width Pixel

Word Wrap

Sort

SubTotal

Grand Total

