

# Infoview Training 5C - Advanced Concepts: Modifying Report Outputs 1

NOVEMBER 2025

## Introduction

### Intro

This Infoview Training 5C advanced concepts module provides an overview of modifying report outputs.

It is provided by the Minnesota Department of Health WIC Program.

### Today's date

Today's date is November 20, 2025.

### Purpose

The next two modules are for anyone who has made do with a template that **mostly** meets their needs but spends time manipulating the exported output to **better** meet their needs.

These modules provide an overview of how to make formatting changes to our own version of the template so that we can work more efficiently and use Infoview more effectively.

## Changing outputs

### Report columns

#### Design mode

We've refreshed the same DUE, OR ONE MONTH OVERDUE, report and are continuing in Design mode.

#### Add column

We can add columns to our report.

For instance, what if we wanted to add Agency ID as the first column in our output?

Once we've identified the appropriate dimension, in this case the merged dimension from both the Cert and MCA queries, or CERTMCAAgencyid...

## Add column 1

...we can click and drag it to the desired position.

We want the small yellow box to show next to the cell border where we want to add the column.

## Column header

Since it's data, the formula field starts with an equal sign, and the dimension is always enclosed within square brackets.

The column headers work separate from the data in their columns.

We can also change header names since Infoview automatically enters the dimension name as the column name.

Let's change it to Agency ID.

First, we need to select the header.

<no audio> Click on the header CERTMCAAgencyid.

## Header formula

Notice the formula bar now reads NameOfCertMCAAgencyid.

We don't need an equal sign since the words "Agency ID" are a constant or text.

Click three times on the current text to highlight it then type Agency ID.

<no audio> Click three times on the current text in the formula bar to highlight it then type Agency ID.

## Select header formula

<no audio> Click three times on the current text in the formula bar to highlight it then type Agency ID.

## Rename header

<no audio> Click three times on the current text in the formula bar to highlight it then type Agency ID.

## Verify rename

We can either click the checkmark icon or press the Enter key.

Hover over the checkmark then click it (or press Enter).

## Multi-select columns

There's always more than one way to do something when in Design mode.

We'll start with the right-click menu and deleting unwanted columns.

We can delete one column at a time or multiple columns using CTRL + click to multi-select individual columns or SHIFT + click to select the first and second columns clicked and any between.

Since First Name and Last Name are private data, we don't need them in our version, let's delete the columns.

This time, we can click on either the header or the data to select the column.

Click the First Name header, hold the Shift key down, and click the Last Name header.

## Multi-select

<no audio> Click the First Name header, hold the Shift key down, and click the Last Name header.

## Right-click

And right-click somewhere on the selected headers.

## Right-click menu

Since we've multi-selected columns, we have fewer options but notice we can merge the contents of the columns, format them, and delete the columns.

The DEL means we can just press the Delete key as well.

Select Delete.

## Remove column

We are removing columns. Select the radio button then click OK.

<no audio> Select the Column radio button then click the OK button.

## Remove column 1

<no audio> Select the Column radio button then click the OK button.

## Undo

Since we've made changes, the Undo icon is available to remove the last change made each time it is clicked.

The CTRL + Z hot key works as well.

Let's take another look at the right-click menu.

Right-click on the first row with 161 in the Agency ID column.

## Right-click menu 2

We can keep columns and rows but not show them in the output, group by specific data, add rows and columns, add a last row to the table with a count, modify how the data displays, and change the appearance of the data.

Go ahead and hover over Hide, Insert, Footer Calculation, Data, and Format Table Cell.

Click the button to continue.

## Wrench button

We can find many of these same options using the wrench icon.

Go ahead and hover over it then click it.

<no audio> Hover over the wrench icon then click it.

## Close main panel

Let's give ourselves more real estate and close the Main Panel.

<no audio> Click the Show Main Panel button to the right of the wrench icon.

## Table cells

### Format panel

Hover over each icon then click Appearance Settings.

<no audio> Hover over each icon to view the tooltip in the format panel then click the Appearance Settings icon.

### Padding

Padding is the amount of white space around the text.

Click the down arrow to collapse this section.

<no audio> Click the down arrow to the left of padding to collapse this section.

### Background

The background color is white even though there are alternating rows of blue and white.

**That** is at the table level, not table cell, so we'll see how to change that in a minute.  
If we click the Agency ID header cell...go ahead...

## Background 1

The cell color is blue, and the custom colors button lets us change it.  
Go ahead and click the button.  
<no audio> Click the custom colors button.

## Background 2

We can select other colors in the grid or if we click on More Colors...

## Background 3

...we have even more color options and can specify using RGB or Hex.  
Double-click in the Hex field and type a6192e then click OK.

## Background 4

<no audio> Double-click in the Hex field and type a6192e then click OK.

## Background 5

<no audio> Double-click in the Hex field and type a6192e then click OK.

## Format painter

Now let's click the Format Painter Icon.

## Format painter 1

Copy Format allows us to change the format of one cell to match the selected cell.  
Format painter is used to change multiple individual cells to match the selected cell.  
Note that multi-selecting does not work with the format painter.  
Reset Format is the same as undo; it removes only the very last change made each time it is clicked.  
Select Format Painter.

## Esc to exit

We should note the message because it disappears, and we will continue to change the format of anything we select until we press the Escape key on our keyboard.

Let's change the Household ID and the Last Set's LDTU headers to red.

<no audio> Click the Household ID header and the Last Set's LDTU header to change their format.

## Change format

<no audio> Click the Household ID header and the Last Set's LDTU header to change their format.

## Escape button

We can't actually use the Escape key in a browser-based training module, so click the Escape Key button to exit the format painter and continue.

## Change color

We don't have to use the Format Painter.

## Change color 1

We can also click on the cell, go to the color swatch dropdown, and select our color.

Which we'll just undo.

# Tables

## Select table

What if we wanted to remove the alternating row color?

As mentioned before that is at the table-level so we must first select the table.

We do this by double-clicking the table border. Go ahead.

<no audio> Double-click the table border to select the table.

## Alternate color

The border turns blue when the table is selected.

We are now modifying "Block 1" instead of a table cell.

And we now have an Alternate Color option.

Go ahead and click on it.

<no audio> Click on Alternate Color.

## Custom color

Now click the custom colors button.

### Custom color 1

Select white from the color grid.

## Collapse background

We can explore other Background options on our own.

Go ahead and collapse it.

<no audio> Click the Background button to collapse the section.

## Borders

Were in the Appearance Settings section so it makes sense that borders are found here.

We can change borders around the whole table or around cells, depending on what's selected.

Most templates have a gray border around all cells.

Let's add a medium black border around our selected table.

Black is the default custom color.

Hover over then click the first dropdown displaying None.

## Border styles

It would be nice if these dropdowns had labels, but they don't.

These are the options for what our border can look like.

Select Plain.

## Border thickness

Hover over then click the second dropdown displaying None.

### Border thickness 1

Options for its width.

Select Medium.

## Apply border

We've selected what we want and now we need to apply it.

We can apply to just one border or...

hover over the two buttons below the custom color button then select All.

<no audio> Hover over the two buttons below the custom color button then select the All button.

## Table border

<no audio – slide description> Table in output has medium-thick black border added.

## Summary

We'll continue our overview of modifying our report output in the next module.

## <Transition slide>

<no audio> Slide transitions to blank topic slide.

## End slide

Thank you for taking the time to review this Infoview advanced concepts training module provided by the Minnesota Department of Health WIC Program.

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