

Infoview Training 5D - Advanced Concepts: Modifying Report Outputs 2

NOVEMBER 2025

Introduction

Intro

This Infoview Training 5D advanced concepts module provides a continued 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 following is a repeat of the purpose from module 5C.

Read through it if you want.

To continue, click the button.

This, and the preceding module, 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

Moving columns

Table cells again

Let's continue by going back to working with individual columns.

Click on the first date in the Last Set's LDTU column.

Moving columns

We can click and drag columns to move them.

We want the small yellow box to show next to the cell border to insert the column.

Notice that the data is moved separately from the header so that both need to be moved.

If we try to move the header before the data, even though it may look like we're inserting a new column, the header is only over-written.

We're just going to undo that...

Formatting reverted

Notice that our LDTU header reverted to the original formatting and is no longer red.

We'll fix that in a sec.

First, let's delete the now empty column.

Delete tip

We selected the header before, and it didn't know if we wanted to delete the row or the column.

Delete tip 1

But if we select the column where the data displays...go ahead and click the first white row of the empty column...

<no audio> Select the first white row of the empty column (where data would display).

Delete tip 2

...and right-click or press the Delete key...this time press the Delete key...

Delete tip 3

...it automatically knows to delete the column saving us a couple clicks.

Formatting text

Fix format

OK. Let's fix our format again.

Click on the Last Set's LDTU header.

Fix color

Click the custom colors button and select the red box under More Colors...

Fix color 1

<no audio> Click the custom colors button and select the red box under More Colors...

Text settings

We want our text to wrap.

Next, let's take a look at Text Settings. Click that icon.

Text wrap

This is where we can change the font, its size, its color, how it looks, and its position.

As well as make our text fit into a cell.

Finding it is the hard part. We know how this stuff works.

Click the Wrap text checkbox.

Other text

Obviously, modifying text is not limited to just the report output.

We can also make changes to the report header information as well.

Click on the report title.

Change text

To change the actual text, we have to work in the formula bar.

We want to remove the "with optional Local Use Answer" part of the title.

It works like any other text field.

Go ahead and hover in front of the "w" in the word "with" in the formula bar, click it...

Highlight text

...and drag to the end of the title.

Delete text

Press the Delete key.

Delete text 1

Like the tooltip said, to make the delete stick, we have to press the Enter key (we can also click the checkmark, or validate formula, icon).

Go ahead and press Enter.

Formatting columns

Change cell size

Let's make one more change and decrease the size of the Agency ID column.

Change cell size 1

We can hover until the double line arrow cursor shows, then click and drag it.

Let's just undo that...

Or...

Layout settings

...we can use layout settings. Click the icon.

<no audio> Click the Layout Settings icon.

Quick display

Click Quick Display Mode to collapse it.

<no audio> Collapse Quick Display Mode.

Print layout

We don't have anything selected right now, so the Print Layout is for the report.

We can change the orientation and the margins here.

If we click on the Agency ID header...go ahead...

Cell size

...we can adjust the cell size.

We can use the minus and plus icons, which will decrease or increase our value by an increment of .1.

We should note that while Width impacts the individual cell, Minimum height will affect all cells in that row.

We can also type our new size.

We're going to change the cell to .6, which we can't get to using the minus icon.

Double-click on the width's 0.85 value.

Preceding 0

We can't just type point 6 (.6), it won't insert the decimal.

We have to type 0.6. Go ahead and do that.

Sorting data

Find sort

Last change to our table. Let's see how it is being sorted.

Sort is found under Show report element data. Click that icon.

Feeding panel

This is called the feeding panel.

It has some functions but is more geared toward report designers, so we can explore it on our own if interested.

The other icons are also more useful to designers, except for the third icon. Hover then click.

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

Sort order

The 0 in the icon indicates there isn't a defined sort order.

Most reports will have a defined sort order but if not, like this report, the report is automatically sorted in ascending order by the data in the first columns.

So, in this case, Agency ID, then Household ID, then State WIC ID, etc.

We can add or change sorts here.

Click the Add a sort dropdown.

Select sort

The dimensions and formulas display in the order of the columns.

Let's sort by the Last Set's LDTU.

Select CERTMCALastcheckldtu.

Ascending

Notice the icon now has a 1.

Default sort is ascending, or lowest to highest, which we can change using this same toggle button we saw in earlier modules.

We can add multiple sorts. Let's also sort by Cert End Date.

Click the Add a sort dropdown and select CERTMCACertificationduedate.

Multiple sorts

<no audio> Click the Add a sort dropdown and select CERTMCACertificationduedate.

Change order

The Cert End Date is sorted within each LDTU.

However, it may make more sense to sort by Cert End Date first.

We can change our sort order by clicking the More button on either row.

The More and Delete button, which we should now be familiar with, display on the selected or blue row.

Click the CERTMCACertificationduedate to see this, then click its More button.

Show buttons

<no audio> Click the CERTMCACertificationduedate row then click the More button.

Move sort up

Select Move Up.

More sort

Much better. Now the LDTU is sorted within each Cert End Date.

There's a More button above the two rows.

Click it just to see what it lets us do.

Save

It lets us delete all sorts at once.

We've made a lot of changes. Let's save them.

Click the Save icon.

Tabs

Tabs

We can also make changes to the report tabs.

We do that by clicking the down arrow to the right of the tab name.

Click the down arrow to the right of Reference – Answer IDs.

Delete tab

We can add a tab, make a copy of this one, get rid of this tab, make it not show on the output, give it a different title, and reorder the tabs.

We'll take a look at a couple of these that we might be more likely to use.

Let's start with Delete.

For instance, maybe we aren't using local use questions and want to delete the reference tab.

Select Delete.

Confirm delete

We get a confirmation message this time.

Click Delete.

Move tabs

Now let's make Nutrition Visits our first tab.

Click on the down arrow to the right of Nutrition Visits.

Move

Select Move.

Select first

Our options are based on where the tab is currently positioned.

Select First.

Rename tabs

Lastly, maybe we want to rename Nutrition Visits to NE Contacts.

Click the down arrow to the right of Nutrition Visits again...

Select rename

...and select Rename.

Type new name

Type: NE Contacts (as shown) and click OK.

<no audio> Type: NE Contacts.

Save name

<no audio> Click the OK button.

Export

We can export in design mode as well.

It's found in the same section as when in Reading mode, which is File, but we may now have to click the More icon to find it.

Click the More icon in the File section.

Summary

We should now know how to modify our columns, cells, tables, titles, and tabs.

Continue with the next module to learn how to filter our report output.

<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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