

Edit Columns on a Table within a Report

Last Modified on 04/05/2024 3:49 pm EDT

Overview

Users can display additional information on a table by adding or editing table columns.

User Account Requirements

The user account you use to log in must have Administrator permission to access the Data Visualization feature.

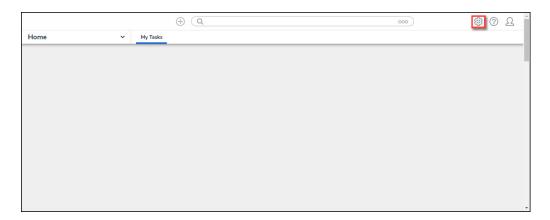
Related Information/Setup

For more information regarding Views, please refer to the Views Over article.

For more information on role permissions, please refer to the Workflow Permissions article.

Navigation

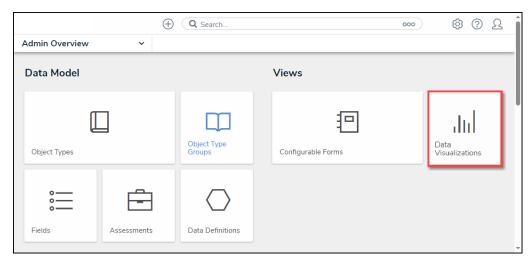
1. From the *Home* screen, click the **Systems** icon.



System Icon

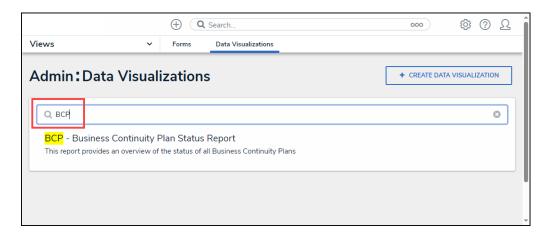
From the *Admin Overview* screen, click the **Data Visualizations** tile under the **Views** section.





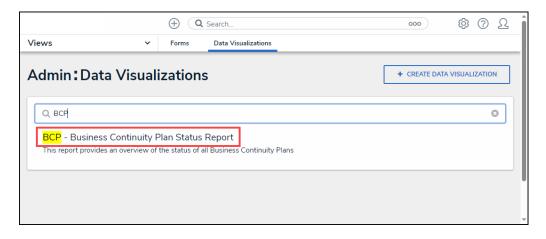
Data Visualization Tile

3. From the *Admin: Data Visualizations* screen, enter a keyword in the **Search** field to narrow the search results list.



Search Field

4. Click the **Report** you want to add or edit a column.



Report Link



Edit Columns in a Report Table

1. From the *Admin: Edit Report* screen, navigate to where the table is on the **Report**.

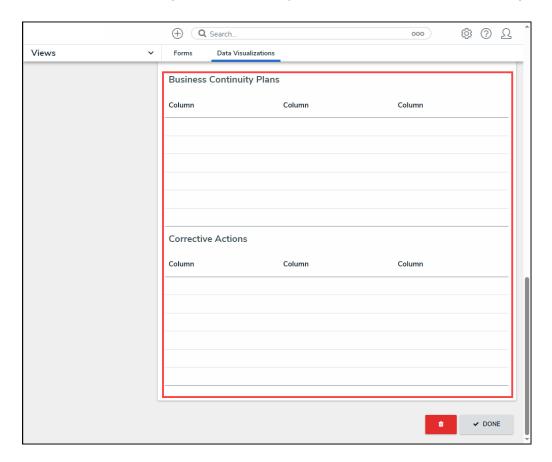
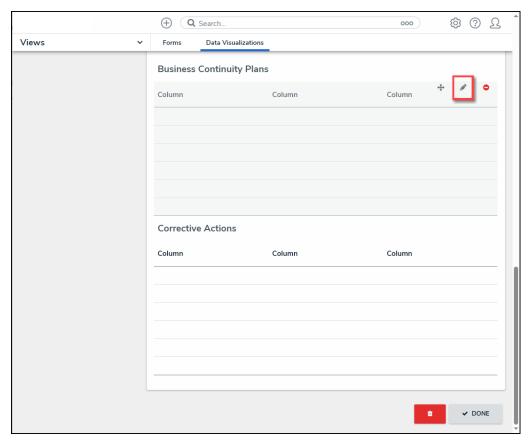


Table Section

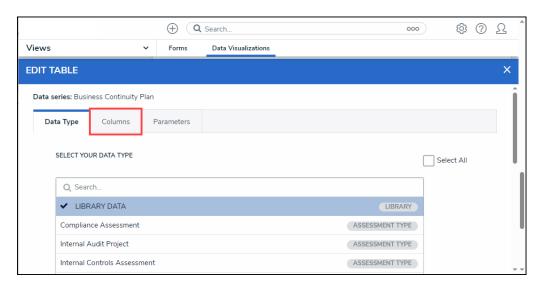
2. Hover the cursor over a table and click the **Edit** icon to edit the table.





Edit Icon

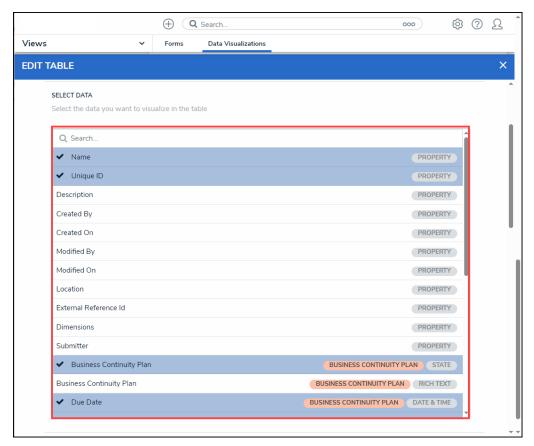
3. From the *Edit Table* screen, click the **Columns** tab.



Columns Tab

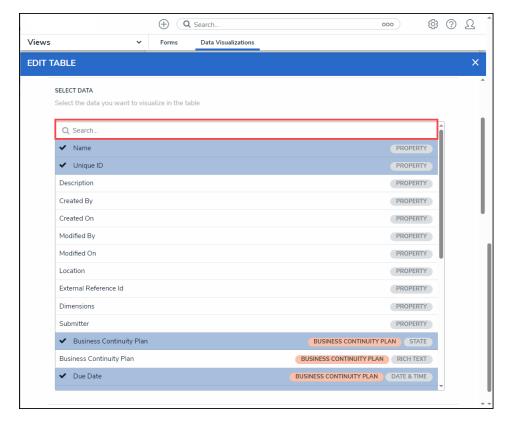
4. From the *Columns* tab, scroll to the *Select Data* section.





Select Data Section

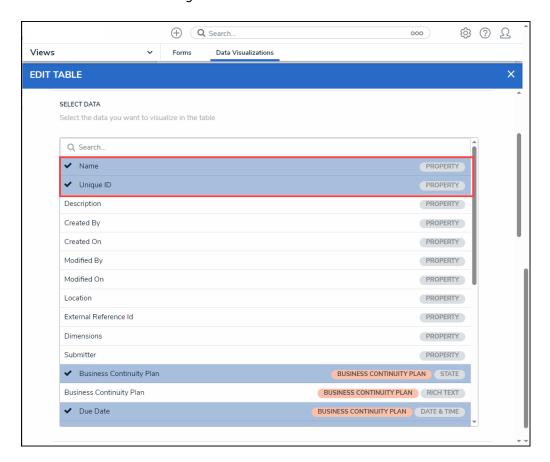
5. (Optional) Enter a keyword in the **Search** field to narrow your search.



Select Data Search Field

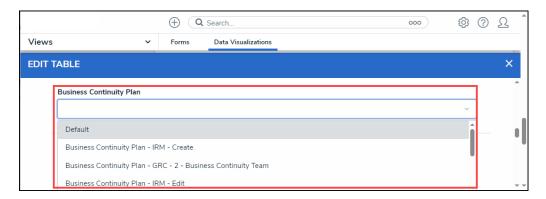


6. Click on a property, workflow state, field, formula, relationship, reference, or role to add the information to the table using a data column.



Select a Column Element

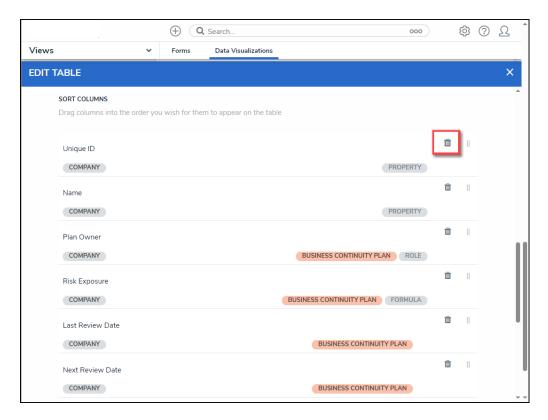
- 7. **(Optional)** Deselect a column element (field, workflow state, etc.) to remove the column from the table.
- 8. Select a default form from the **Default Custom Forms** dropdown menu. The form selected will appear when a user clicks on the table data. Choosing **Default** will display the form on the user's role permissions for the object type.



Default Custom Forms Dropdown

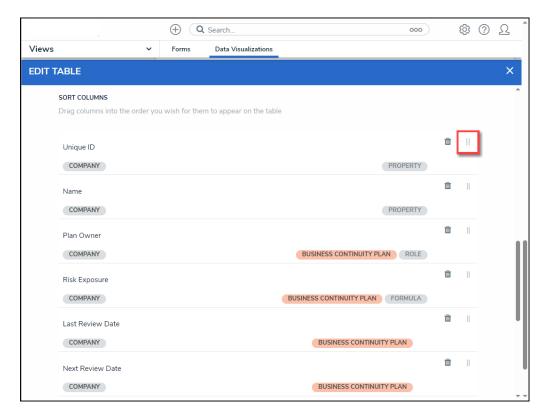
9. **(Optional)** From the **Sort Columns** section, click the **Delete** icon to remove a column from the table.





Delete Icon

10. (Optional) Click the Move icon to rearrange the columns on the table.

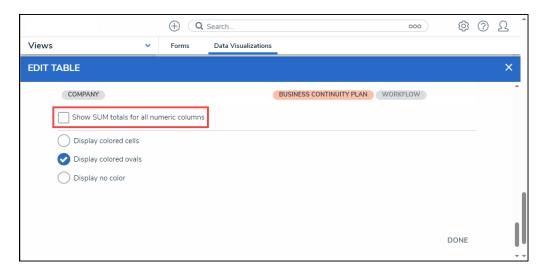


Move Icon

11. (Optional) Select the Show SUM totals for all numeric columns checkbox will display

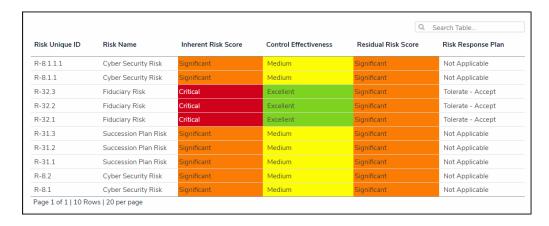


the total value of all numeric fields on the table.



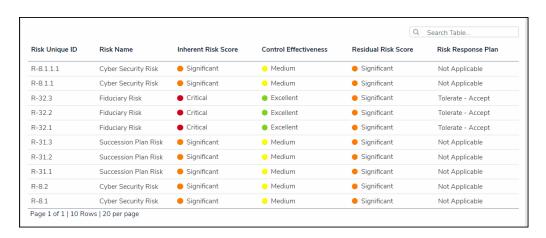
Show SUM total for all numeric columns

12. **(Optional)** Select the **Display Colored Cells** checkbox to display formulas or select list cells with text and full background color.



Display Colored Cells

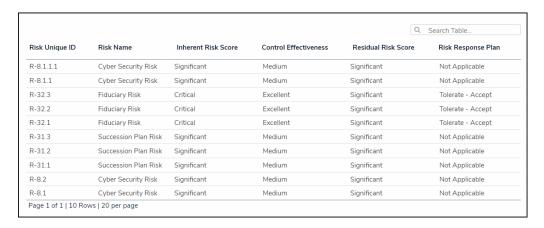
13. **(Optional)** Select the **Display Colored Ovals** checkbox to display formulas or select list cells as text with colored circle background.





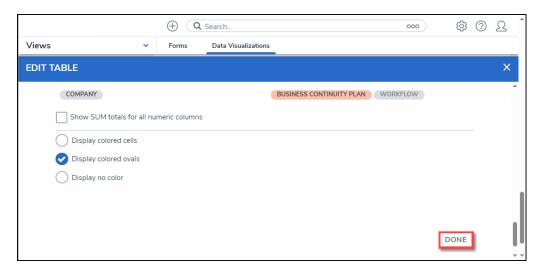
Display Colored Ovals

14. **(Optional)** Select the **Display No Color** checkbox to display formulas or select list cells as text with no background.



Display No Color

15. Click the **Done** button to apply your changes.



Done Button