How to Find Basic Report Formatting Tools

Tabs and subtabs with multiple formatting functions are displayed when the report is in **Design** mode.

#1: Report should be open in **Design** mode for formatting, with **Structure only** selected.

#3: Click on **Document Structure and Filters** icon to display structure in left panel.

Figure 1: Screen setup

#2: Clicking on **Page** mode displays a 'print preview' so you can see what needs to be adjusted in your report.

Step-by-Step Instructions	HINTS
• Start with your report open in **Design** mode**, Structure only. (Figure 1**, **#1)** • Click on **Page** mode (not **Quick Display** mode) (**Figure 1, #2)** • Click on the **Document and Filters** icon to open the left panel display.(**Figure 1, #3)**	• When in **Design** mode, all the tabs and subtabs are displayed, making available all of the formatting functions. • Selecting **Structure only** allows for faster formatting of the report because there is no data to manipulate. • **Page** mode allows you to see a 'Print Preview' of the report to see what formatting you might need to adjust.
OPTION A: Use the **Report Elements**, **Formatting**, and **Page Setup** tabs and their subtabs to find the tools needed to format the report.	Review the table on the last page of this help document which lists the subtab categories for each of the main tabs as well as the functions contained under each subtab.

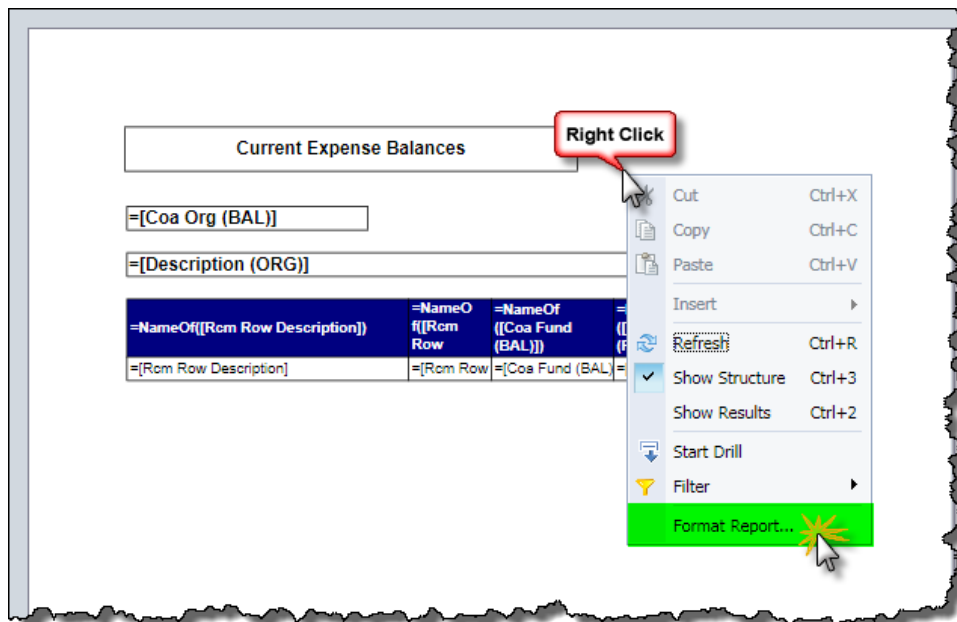|	
OPTION B: **Right-click** on the component that you want to format. • Right-click on the element in the report itself or in the open space between elements. (**Figure 2**) -- OR – • Right-click on the element listed in the **Document Structure and Filters** panel. (**Figure 3**)	• Contextual menus drop down on right-clicking and at the very bottom of the menu, select **Format Cell** (or **Section**, or **Report**, or **Table** depending). • Sometimes it can be difficult to select the precise element that you want in the report itself and it is easier to right-click on the name of the element in the **Document Structure and Filters** panel.

Figure 2: Right-click on elements in the Report panel for formatting purposes and then select **Format Report/Cell/Section** from the menu. In this example, the right-click location is open space and therefore the menu item **Format Report** displays.

Figure 3: Right-click the element listed in the **Document Structure and Filters** panel that you need to format and then select **Format Table/Header/Report** from the menu. Note that sometimes it's easier to click on the element in this panel than try to click on the precise element in the large **Report Panel**. In this example, we are right-clicking on the table.
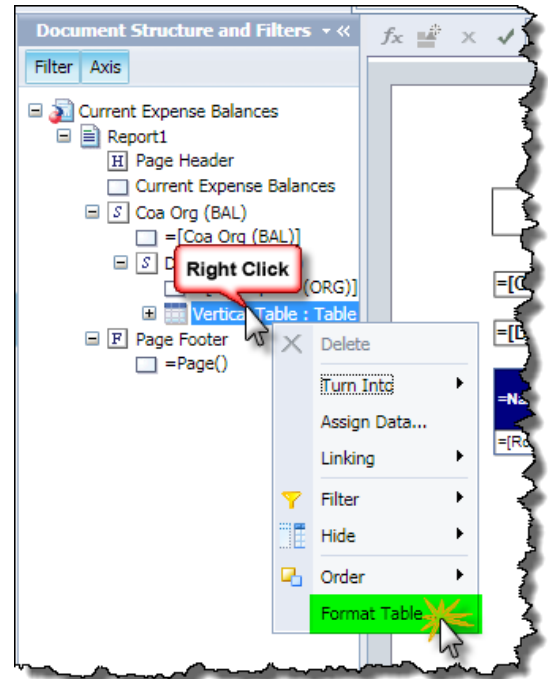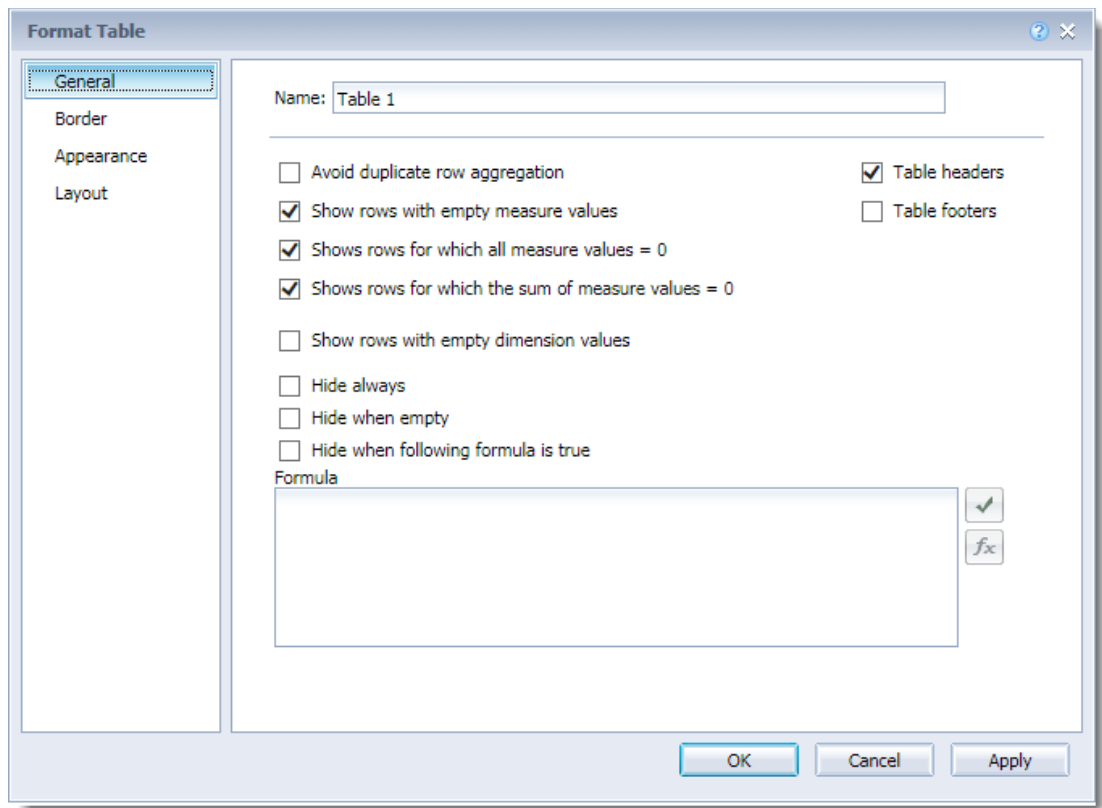
Figure 4: The **Format Table** dialog box displays when you right-click on the table, either in the report itself or in the **Document Structure and Filters** panel. Numerous formatting options are available under the subheadings of **General**, **Border**, **Appearance**, and **Layout**.

The following chart lists the tabs, their subtabs, and the functions under each subtab so that it is easier to locate an individual function. **Shaded columns have most of the tools for formatting.**

Report Elements	Formatting	Data Access	Analysis	Page Setup

TABLES
- Define vertical table
- Define horizontal table
- Define cross table
- Define form

CELL
- Blank
- Pre-Defined

SECTION
- Insert Section

CHART
- Insert Column Chart
- Insert Line Chart
- Insert Pie Chart

OTHER
- Insert Bar Chart
- Insert Point Chart
- Insert Other Chart

TOOLS
- Turn into
- Set as Section

POSITION
- Order
- Align

LINKING
- Linking
- Document
- Element

Table Layout
- Break
- Insert
- Header
- Footer

Behaviors
- Hide
- Page Break
- Repeat

Font
- Font Name
- Font Size
- Grow font
- Shrink Font

Border
- Borders
- Border color

Cell
- Merge
- Clear

Style
- Bold
- Italic
- Underline
- Strikethrough
- Text Color
- Background Color
- Background Image

Numbers
- Currency
- Percentage
- Number Format

Alignment
- Align Left
- Align Center
- Align Right
- Align Top
- Align Center
- Align Bottom
- Wrap Text

Size
- Width
- Height

Padding
- Horizontal
- Vertical

Tools
- Format Painter
- Formatting
- Clear Formatting

Data Providers
- Edit
- Purge
- Refresh

Data Objects
- New Variable
- Merge

Filters
- Filter
- Ranking
- Input Controls

Data Tracking
- Track
- Show Changes

Display
- Group
- Break
- Sort

Conditional
- Formatting Rules

Interact
- Drill
- Filter Bar
- Outline

Functions
- Sum
- Count
- More
- Formula Bar

Report
- Add Report
- Duplicate Report
- Delete Report

Rename Report
- Report Name

Move Report
- Move Left
- Move Right

Page
- Page Orientation
- Page Format

Header
- Show
- Height

Footer
- Show
- Height

Scale to Page
- Width
- Height
- Scale

Margins
- Top
- Bottom
- Left
- Right

Display
- Page mode
- Quick Display
- Max
- Rows
- Columns