Design

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Overview

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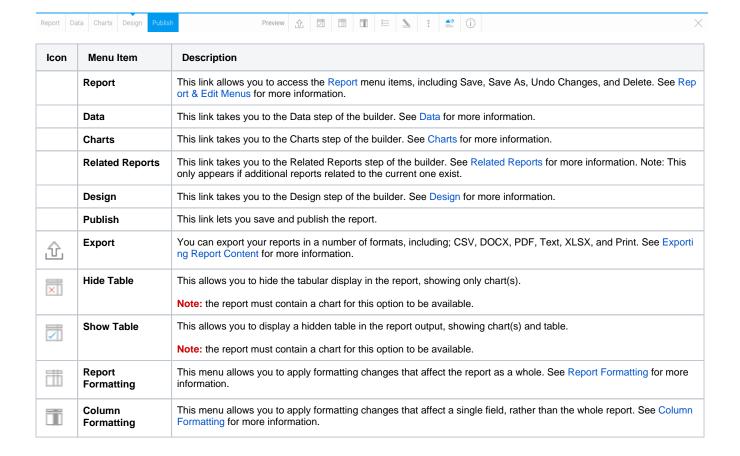
The Design step of the Report Builder has two different functions, based on the status of the report:

- 1. Draft: when a report is in draft mode, the Design step provides formatting functionality to allow the report writer to change the display of the table, and define the multi-chart canvas if required.
- Active: when a report is active, the Design step of the builder provides report action functionality, along with the option for appropriate users, based on role permissions, to place the report back into draft mode and edit various components. Report actions include exporting, sharing, and broadcasting the report.

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When you are viewing a draft report you will have access to the following menus, depending on your role permissions.



<u> </u>	Conditional Formatting	This menu allows you to apply alerts to a field based on defined conditions. See Conditional Formatting for more information.
	Section Formatting	This menu allows you to apply formatting changes that affect to the way sections are displayed. See Section Formatting for more information.
0	Related Reports Formatting	This menu allows you to apply formatting changes that affect the way Co-Display Reports are displayed. See Related Reports Formatting for more information.
8	Filter Formatting	This menu allows you to apply formatting changes that affect the way filters are displayed. See Filter Formatting for more information.
	Annotation	This menu allows you to view and create annotations. See Report Annotation for more information.
0 8	КРІ	This menu allows you to change the output to a KPI report display for use on a KPI Dashboard Tab. See KPI Reports for more information.
40	Summary	This menu allows you to create a summary of the report's key metrics and category breakdowns. See Report Summary for more information.
<u>(i)</u>	Details	This menu allows you to view a useful collection of Report, Column, and SQL information. See Report Details for more information.
×	Close Builder	This button closes the builder and returns you to your previous location.
	Report List Panel	This panel allows you to view a list of reports to open, rather than having to navigate to the Browse Page.
3	Multi-Chart Canvas	This panel is available when multiple charts have been created on the Charts step of the builder. It allows you to configure your Canvas. See Canvas for more information.

Active Design Step

more information.

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Report Edit

When you are viewing an **active** report you will have access to the following menus, depending on your role permissions.

Icon	Menu Item	Description
	Report	This link allows you to access the Report menu items, including New, Copy, and Delete. See Report & Edit Menus for more information.
	Edit	This link allows you to access the Edit menu items, including Data, Charts, Related Reports, Design, and Name & Description.
û	Export	You can export your reports in a number of formats, including; CSV, DOCX, PDF, Text, XLSX, and Print. See Exporting Report Content for more information.
≪°	Share	This menu allows you to share this report with others through the use of Distribution, Email, and Embedding. See Sharing Reports for more information.
50	Broadcast	This menu allows you to schedule this report to be sent to users via Broadcast, FTP, and Subscriptions. See Broadcasting Reports for more information.
Û	Favourite	This button allows you to add a report to your Favourites list for quick access.
	Bookmark	This menu allows you to create Bookmarks. Snapshots, and new versions of a report. See Bookmarks & Snapshots for

	Annotation	This menu allows you to view and create annotations. See Report Annotation for more information.
(j)	Details	This menu allows you to view a useful collection of Report, Column, and SQL information. See Report Details for more information.
×	Close Builder	This button closes the builder and returns you to your previous location.
	Report List Panel	This panel allows you to view a list of reports to open, rather than having to navigate to the Browse Page.
D	Comments Panel	This panel allows you to view, create, and manage comments made on the report. See Comments for more information.