# Output

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## Overview

The Output 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 Output step provides formatting functionality to allow the report writer to change the display of the table, and define the multi-chart canvas if required.
2. Active: when a report is active, the Output 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.

## Draft Output Step

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

| Report | Data | Charts | Related Reports | Output | ⬆ | 📄 | ▦ | ▣ | ☰ | ☰ | 🗔 | ▽ | ◲ | ⋮ | 🖼 | ⓘ | ✕ |

| Icon | Menu Item | Description |
|---|---|---|
|  | **Report** | This link allows you to access the Report menu items, including Save, Save As, Undo Changes, and Delete. See Report & Edit Menus for more information. |
|  | **Data** | This link takes you to the Data step of the builder. See Data for more information. |
|  | **Charts** | This link takes you to the Charts step of the builder. See Charts for more information. |
|  | **Related Reports** | This link takes you to the Related Reports step of the builder. See Related Reports for more information. |
|  | **Output** | This link takes you to the Output step of the builder. See Output for more information. |
| ⬆ | **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. |
| 📄 | **Hide Table** | This allows you to hide the tabular display in the report, showing only chart(s). **Note:** the report must contain a chart for this option to be available. |
| ▦ | **Show Table** | This allows you to display a hidden table in the report output, showing chart(s) and table. **Note:** the report must contain a chart for this option to be available. |
| ▦ | **Report Formatting** | This menu allows you to apply formatting changes that affect the report as a whole. See Report Formatting for more information. |
| ▣ | **Column Formatting** | This menu allows you to apply formatting changes that affect a single field, rather than the whole report. See Column Formatting for more information. |
| ☰ | **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. |
| 🗔 | **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. |

| | Filter Formatting | This menu allows you to apply formatting changes that affect the way filters are displayed. See Filter Formatting for more information. |
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| | Annotation | This menu allows you to view and create annotations. See Report Annotation for more information. |
| | KPI | 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. |
| | Summary | This menu allows you to create a summary of the report's key metrics and category breakdowns. See Report Summary for more information. |
| | 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. |
| | 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 Multi-Chart Canvas. See Multi-Chart Canvas for more information. |

## Active Output Step

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

| Report | Edit | ⬆ ⤳ 🔊 ☆ 🔖 ◣ ⓘ | ✕ |
|---|---|---|---|

| 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, Output, and Name & Description. |
| | 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 for more information. |
| | Broadcast | This menu allows you to schedule this report to be sent to users via Broadcast, FTP, and Subscriptions. See Broadcasting for more information. |
| | 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 more information. |
| | Annotation | This menu allows you to view and create annotations. See Report Annotation for more information. |
| | 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. |

| | **Comments Panel** | This panel allows you to view, create, and manage comments made on the report. See Comments for more information. |
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