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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.
2. 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.

Draft Design Step

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When you are viewing a **draft** 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 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. Note: This only appears if additional reports related to the current one exist.
	Design	This link takes you to the Design step of the builder. See Design for more information.
	Publish	This link lets you save and publish the report.
	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.
	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 Canvas. See Canvas for more information.

Active Design Step

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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.
	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.
	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.
	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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