Report & Edit Menus

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Overview

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When a report is initially created it's in **draft** mode. This means that it's currently being edited and cannot be accessed by other users. When the report is complete it's **activated**, meaning that it's ready for consumption. Different menu options are available through the Report & Edit menus depending on this status.

Report Menu

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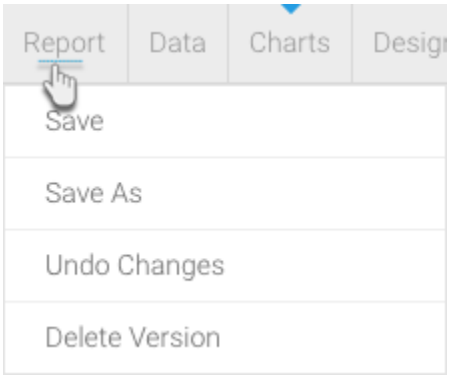
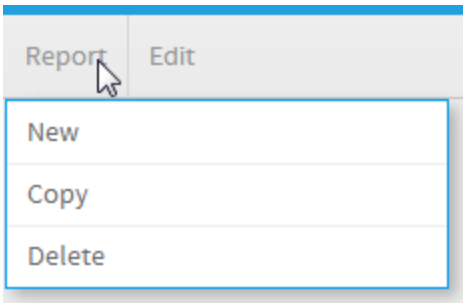
Draft Report



Option	Description
Save	This allows you to activate the current report. If you've previously activated the report this will replace the previous version.
Save As	This allows you to activate the current report as a new report. The previous active version of the report will remain, with the current version being saved under a new name.
Undo Changes	This allows you to delete the current draft version of the report, returning to the previous active version.

Delete Version	This deletes the current draft report. If the report was previously activated, you will still have that copy of the report.

Active Report



Option	Description
New	This allows you to leave the current report and begin creating a new one.
Copy	This allows you to create a separate copy of the current report, which you can manipulate without effecting the original.
Delete	This allows you to delete the current report from the system.

Edit Menu

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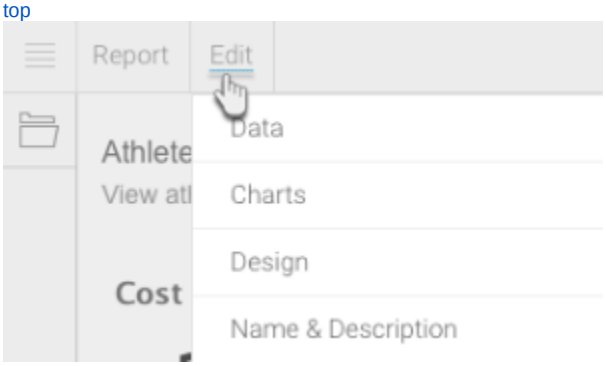
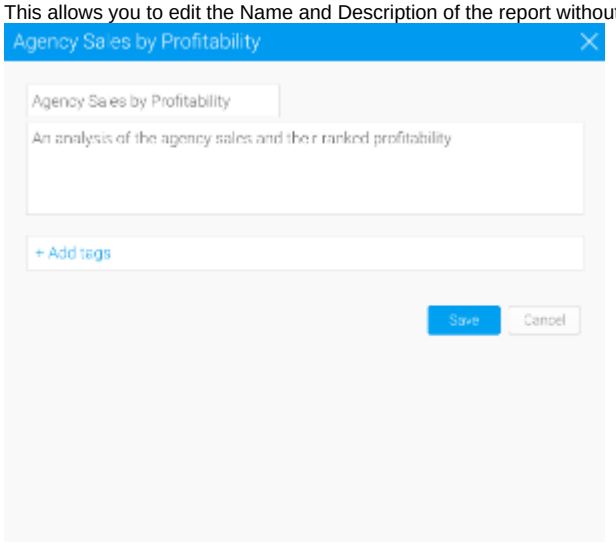


Option	Description
Data	This allows you to place the report into draft mode and directly access the Data step of the builder.
Charts	This allows you to place the report into draft mode and directly access the Charts step of the builder.
Related Reports	This allows you to place the report into draft mode and directly access the Related Reports step of the builder.
Design	This allows you to place the report into draft mode and directly access the Design step of the builder.

Name & Description	This allows you to edit the Name and Description of the report without placing it into Draft mode. 

Edit Report

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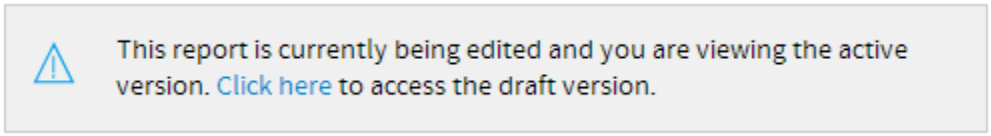
Once a report has been activated, the next time it is placed into **draft** mode the **active** version will remain. This means that the report can still be used on the dashboard, storyboard, discussion, and by report readers. When the edit is complete the report writer will have the option to either **Save** the report, replacing the current **active** report, or **Save As** which creates a new report.

Draft Vs. Active

Active

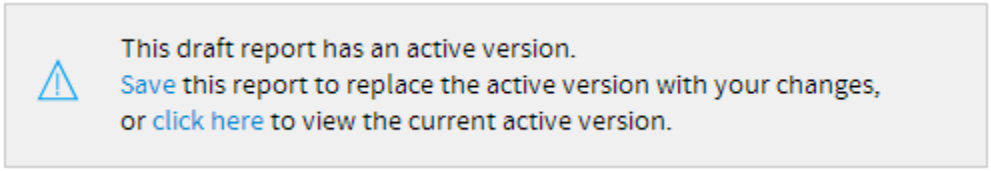
If a user accesses an active report that currently has a draft version, and they have role permissions to edit reports, they will see this message.



This is designed to remind the user that there is a draft version available, and allow them to move between the two versions easily.

Draft

If a user access a draft report that currently has an active version they will see this message.



This is designed to remind the user that there is an active version available, allowing them to compare their changes with this version, moving between them easily.

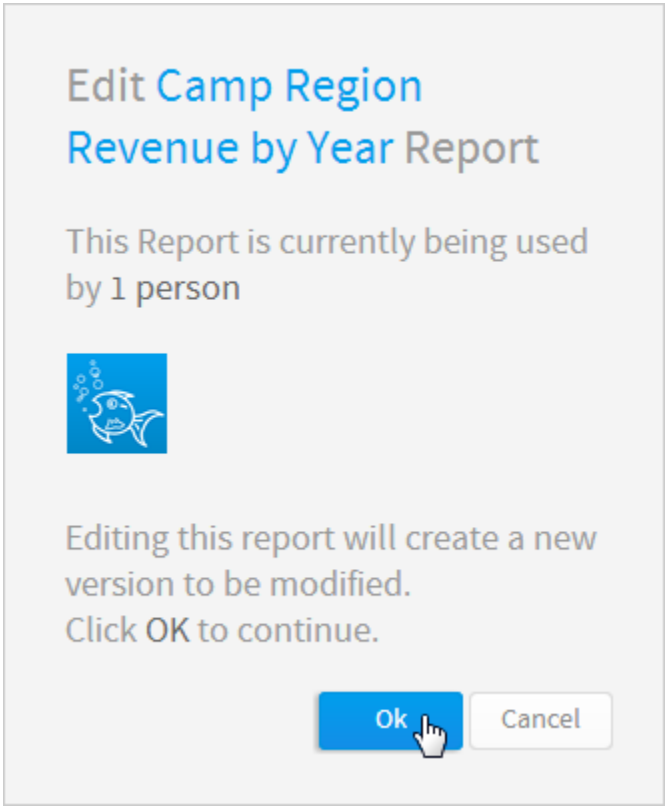
Note: there can only ever be one draft and one active version of a report at a time.

Confirmation Prompts

When a user goes to edit an active report, they will see one of the following confirmation messages, depending on their role permissions.

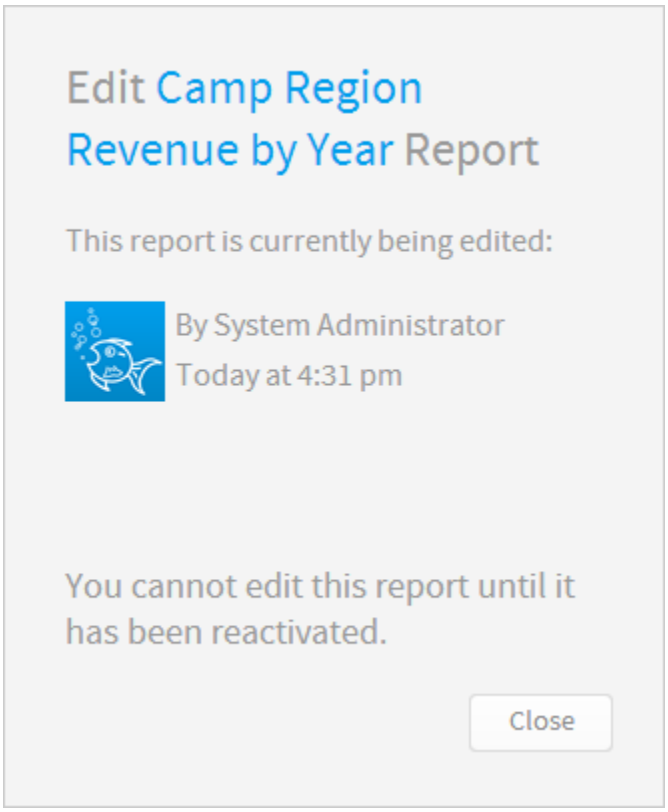
Confirm

This is a confirmation window appears when a user has access to edit the report.



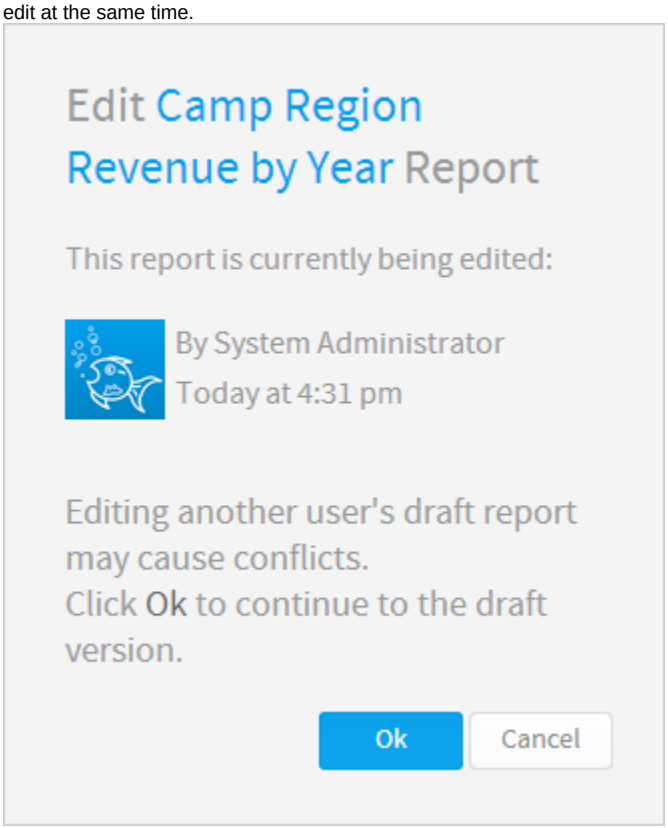
No Access

This is a confirmation window that appears when a user tries to edit a report that another user is currently editing.



Override

This is a confirmation window that appears when a user tries to edit a report that another user is currently editing, and they have role permission to edit at the same time.



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