








Edit or Delete a Report

Last Modified on 09/07/2021 12:09 pm MDT



You cannot edit or remove the data definitions saved to a report without deleting the report then recreating it; however, edit functionality for data definitions is scheduled for an upcoming release in the near future.

To edit or delete a report:

1. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
2. Click the report you want to edit or enter the name of the data visualization in the **Search** field, then click it edit it.
3. To edit the name or description, click the  icon, then make your changes as needed in the **Name** and **Description** fields.
4. To include or exclude **archived data** from the report, click the  icon, then select or deselect the **Include archived data in report** checkbox.
5. To add or remove filters, click **Configure Filters** in the **Filters** field, then click the fields, relationships, or formulas to add or remove them as filters.
6. Select whether the report should be displayed to the user in a portrait or landscape format by clicking the corresponding button in the **Report Orientation** section.
7. To add or edit the **header and/or logo** on a PDF export file for the report, click **PDF Output Options**, then make you changes as needed.
8. To edit an element on the canvas, hover your cursor over the element, click the  icon, make your changes, then click **Done** when finished.
9. To rearrange the elements on the canvas, hover your cursor over an element, click the  icon and drag the element to a new location.
10. To delete an element, hover your cursor over the element, click the  icon, then click **Yes** to confirm.
11. To delete a report, click the  icon at the bottom of the **Edit Report** page, then click **Yes** to confirm.



Deleting a report will also delete any filters, parameters, and elements added to it.