

Edit a Report

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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:

- 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.
- 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.