Add AutoText to a Report

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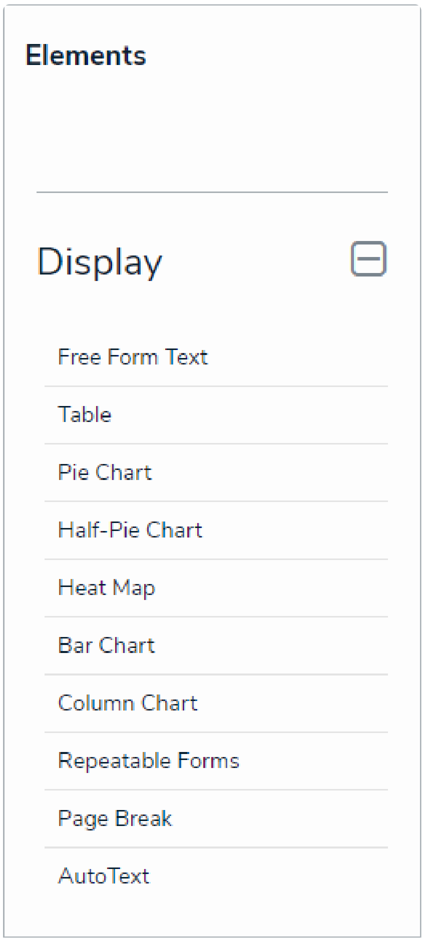
AutoText sections of a report allow administrators to create text that will automatically populate with object values based on the report's context.

To add AutoText to a report:

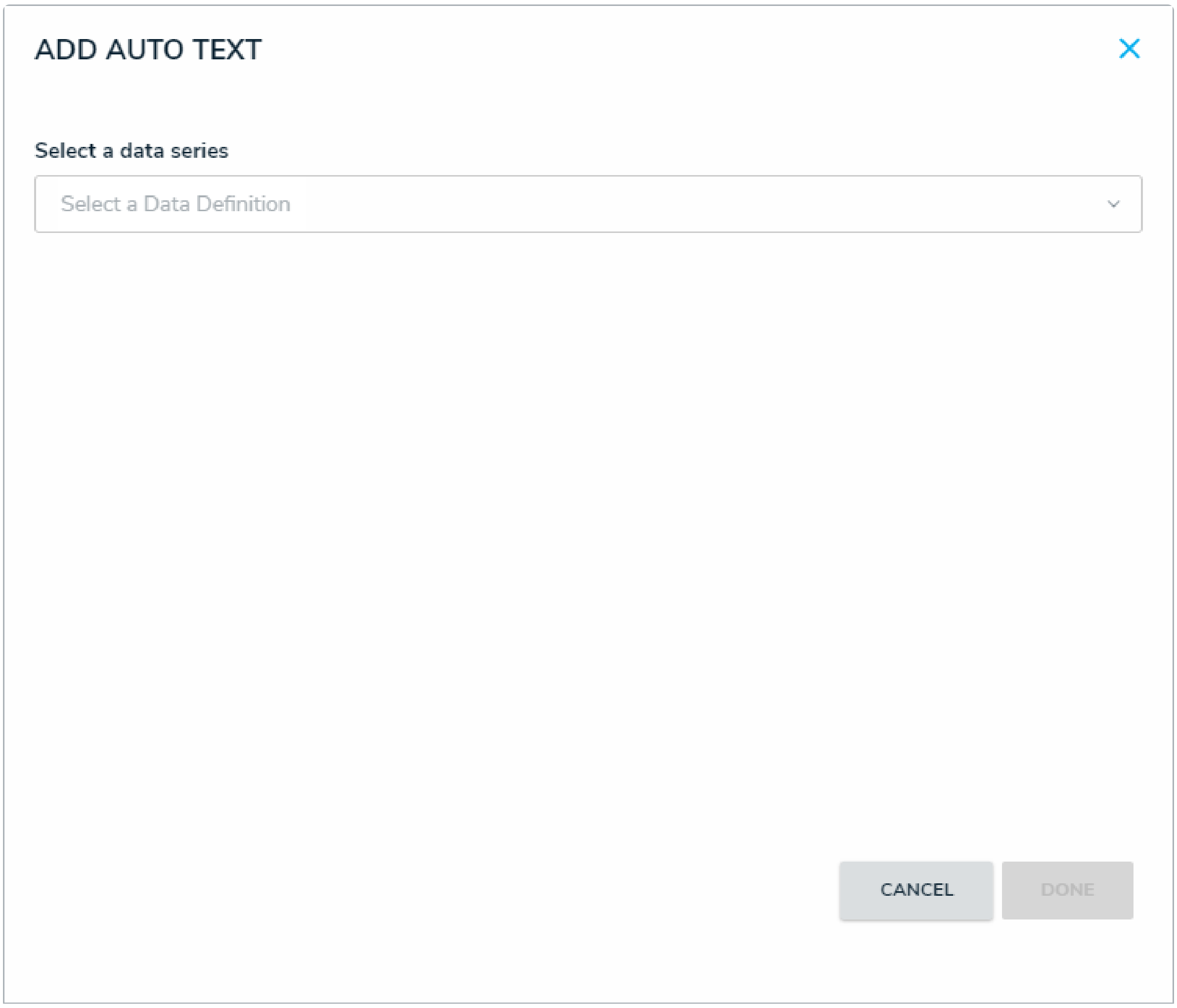
1. In the **Elements** section, click the icon beside **Display**.



The Elements section.

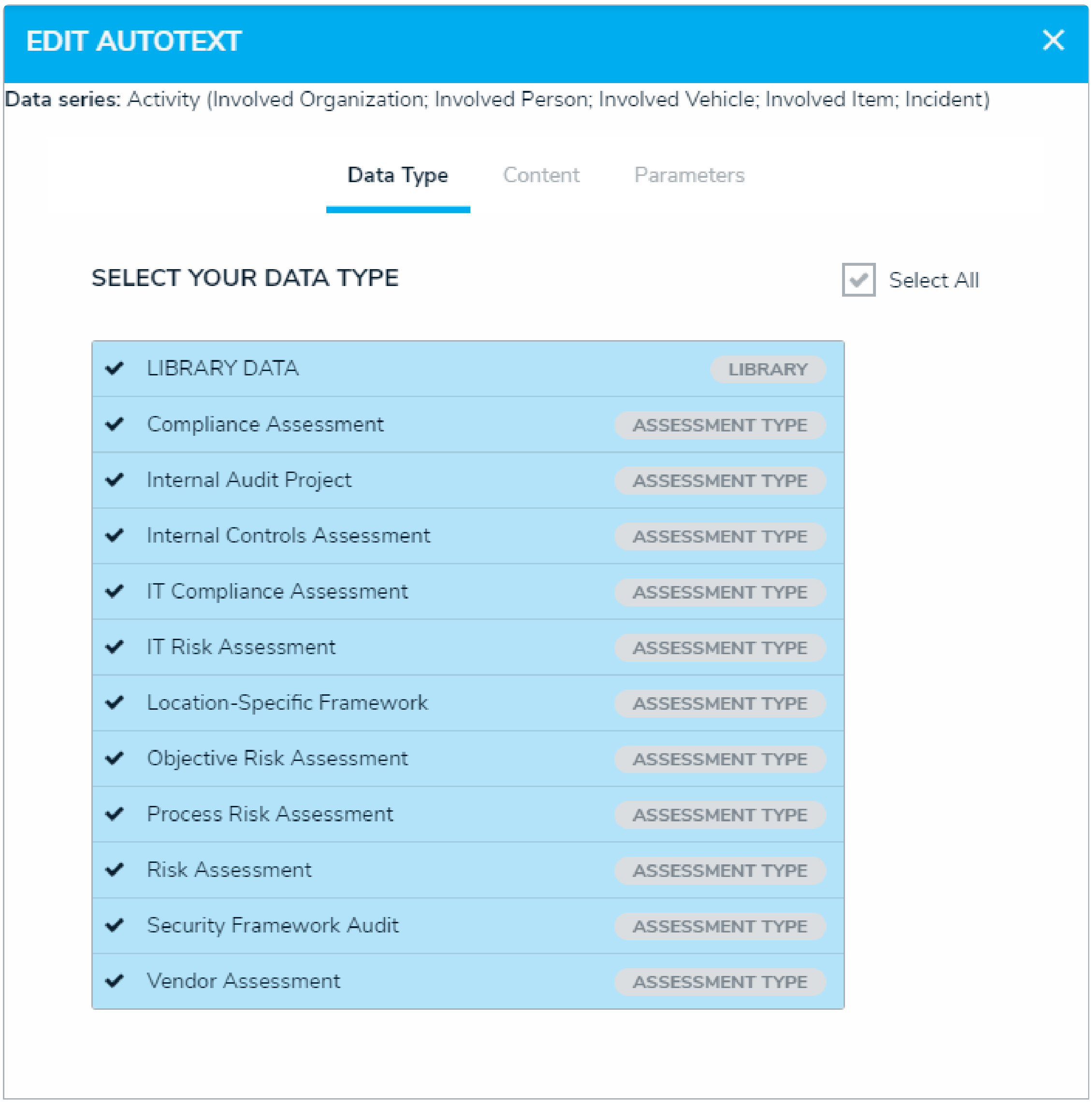
2. Drag and drop **AutoText** from the **Elements** section to the **Report Canvas**.

3. Select a data series from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types' data you can choose to display in the AutoText section.



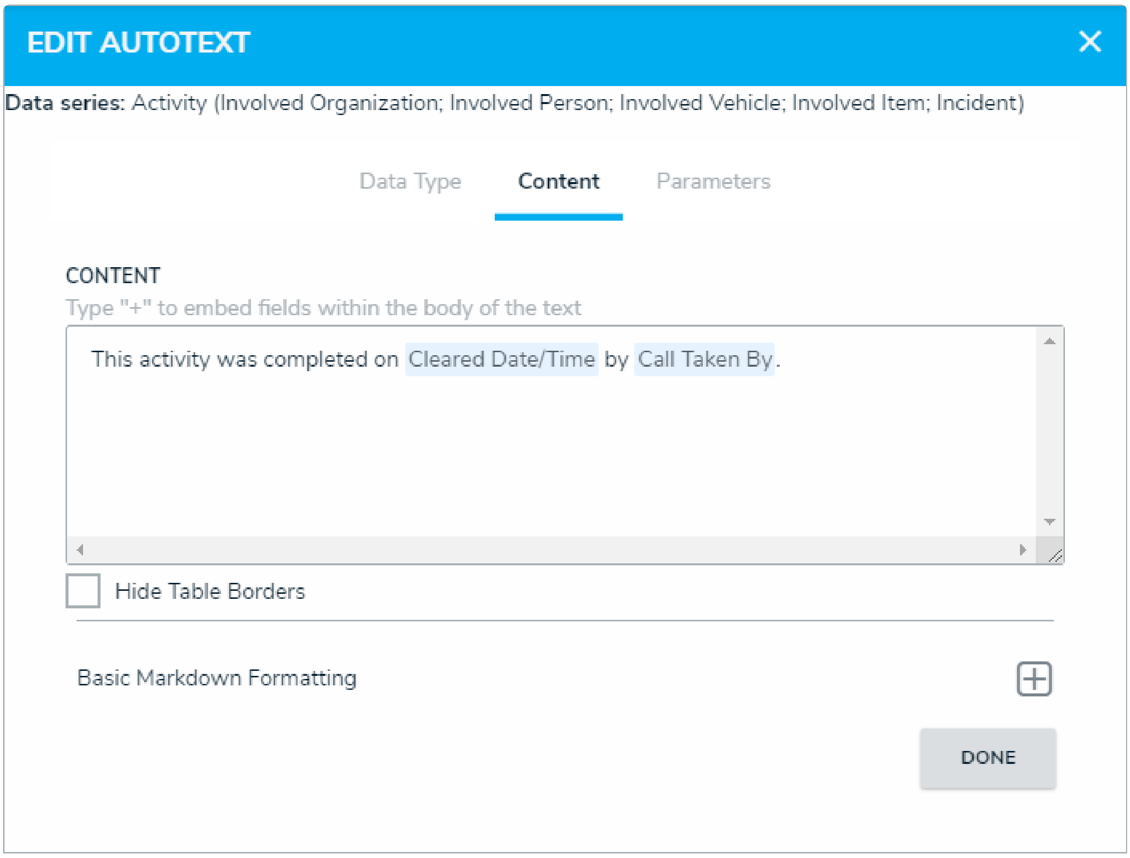
Selecting a data series.

4. Choose the data types you'd like to display in the form from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.



The Data Type tab.

5. In the **Content** tab, enter the information you wish to display in the AutoText section. To embed a particular field in the section, type a **+** sign before the name of the field. The text is all Markdown based.



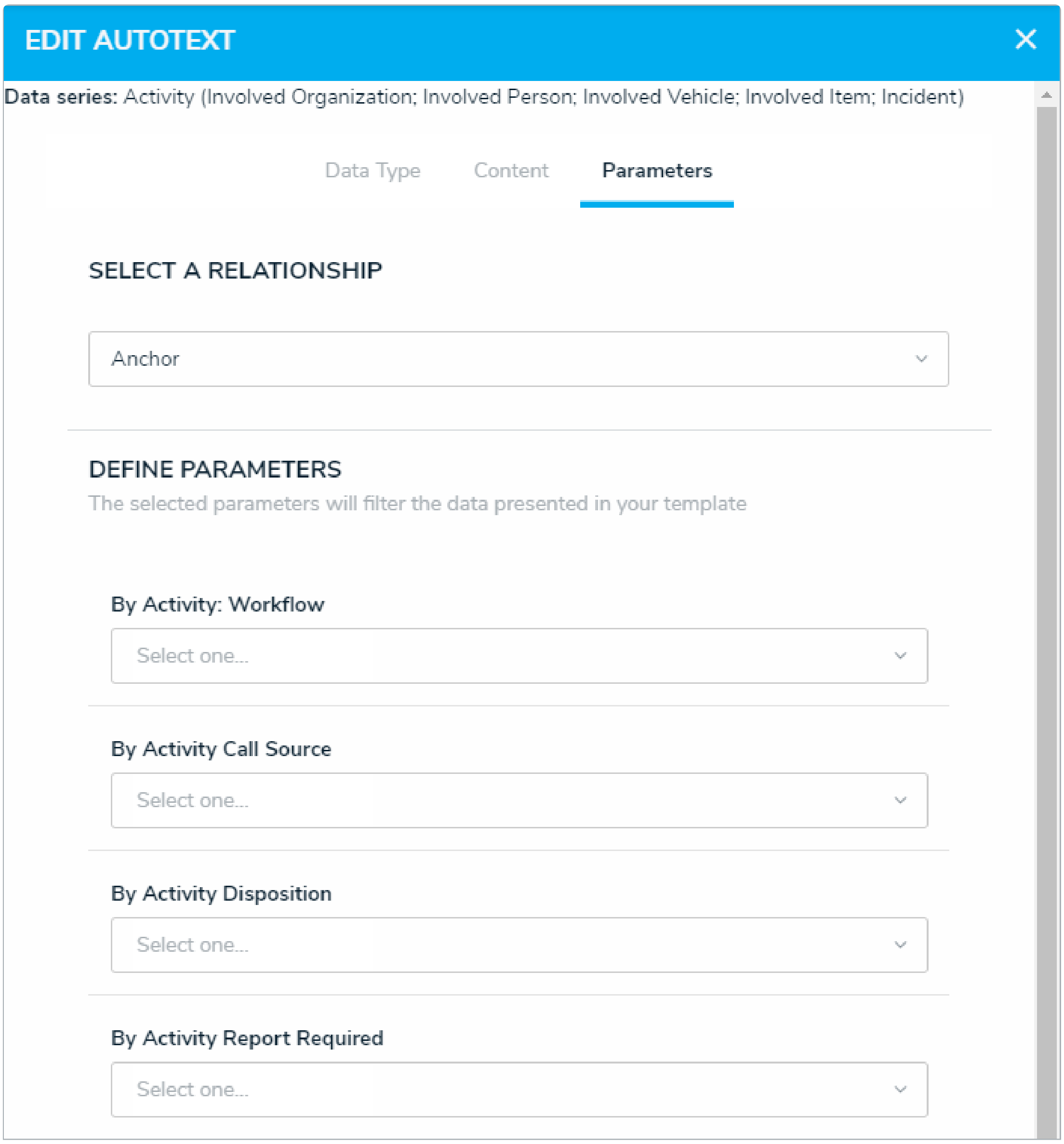
The Content tab.

6. In the **Parameters** tab:

    a. Select either the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected as the data series in step 3 above.

    b. Select one or more parameters to filter the displayed data in the fields in the **Define Parameters** section.

    c. To remove a select list, formula, or role parameter, click the **x** icon beside parameter. To delete a date parameter, click the field, then press the **Backspace** or **Delete** key on your keyboard.



The Parameters tab.

7. Click **Done**.

8. Repeat the steps above to continue adding more AutoText sections to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it on the canvas, then click the icon.
9. Once you're done adding elements and configuring your report, you must add it to a report view to make it available to end-users. See the Views Overview and Create a Report View articles for more information.