Manage Report Templates and Groups

After saving one or more custom report templates, users can create groups and organize the report templates within the groups. The groups then appear as categories on the navigation menu, with the group report templates listed as links within each group category.

Create a New Group

1. Click the **Manage Reports** link in the navigation menu.

2. On the Manage Reports page that opens, click the **New Group** button (located toward the lower left-hand corner of the page).
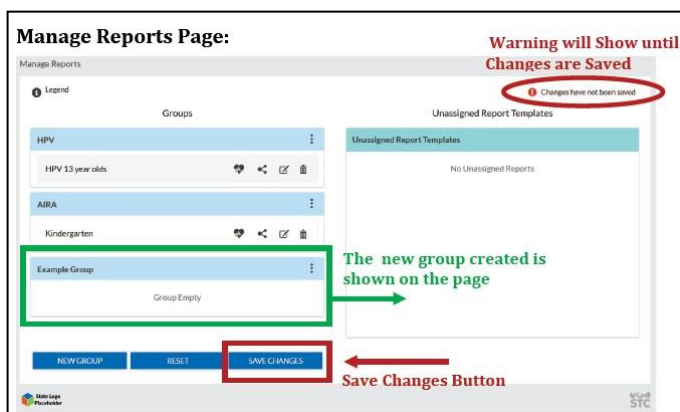

3. Enter a unique name for the group in the Group Name textbox that appears, then click **Create**.

4. The group name then appears in the Groups section of the page (upper left side of the page). Click **Save Changes** if finished creating groups.
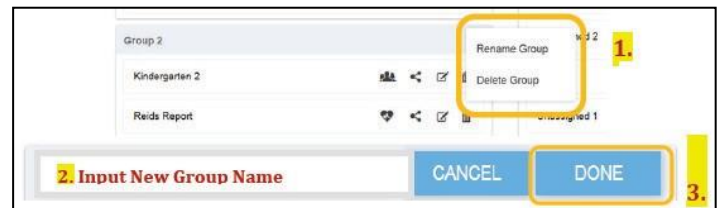

Move a Report Template to a Group

To place a report template into a group, simply drag and drop the report template from its current location to the new group. After clicking **Save Changes**, the report name appears under the group name in the navigation menu.

Rename or Delete a Group

To rename a group, click on the three dots icon (⋮) located to the far right of the group name, then click **Rename Group**. Enter the new group name and click **Done**. Click **Save Changes** at the bottom of the page when finished.

To delete a group, repeat the steps above, but click **Delete Group** instead. When finished, click the **Save Changes** button at the bottom of the page.

Edit or Delete a Report Template

To edit a report template from the Manage Reports page, click the **Edit** icon (✎), make the changes needed, and click the **Save** icon (🔒).

To delete a report template from the Manage Reports page, click the **Delete** icon (🗑), then click the **Save Changes** button at the bottom of the page.

Unassigned Report Templates

Before report templates are assigned to a group, they are placed in the Unassigned Report Templates section by default. They are also listed separately in the menu under any report groups (categories) that have been created. To place an unassigned report template into a report group, drag and drop it into the group.

Icons

Icons are used for managing groups and report templates. Explanations of the icons are found by hovering over the Legend at the top left of the page.