

New report setting

September 11, 2026

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A new report setting is the configuration surface where you arrange report tabs, widgets, and report-view options. A report tab groups related widgets in that view.

If you need to...	Go to
Check fields, values, and actions	Understand the report-setting screen
Add tabs or widgets and set options	Configure report tabs and options
Import tabs	Handle import and conditional report-setting branches
Save or review history	Save and review the report setting
Find an existing setting	Reports settings
Maintain an existing setting	Edit report setting

This page covers the fields, workflow uses, and save-related outcomes for the new-setting surface.

Prerequisites

Before you start, make sure you can open `/configuration/reports-settings/new` and that the page is in edit mode. When the page is editable, **Widget**, **Tab**, **Save**, and **Save and Close** are available. No field is marked as required on the page. After you change the page, leaving may open a confirmation prompt.

Find the new report-setting page

The new report-setting page is `/configuration/reports-settings/new` . Use the Reports settings list to find a saved setting, and use the edit page to maintain one that already exists.

Understand the report-setting screen

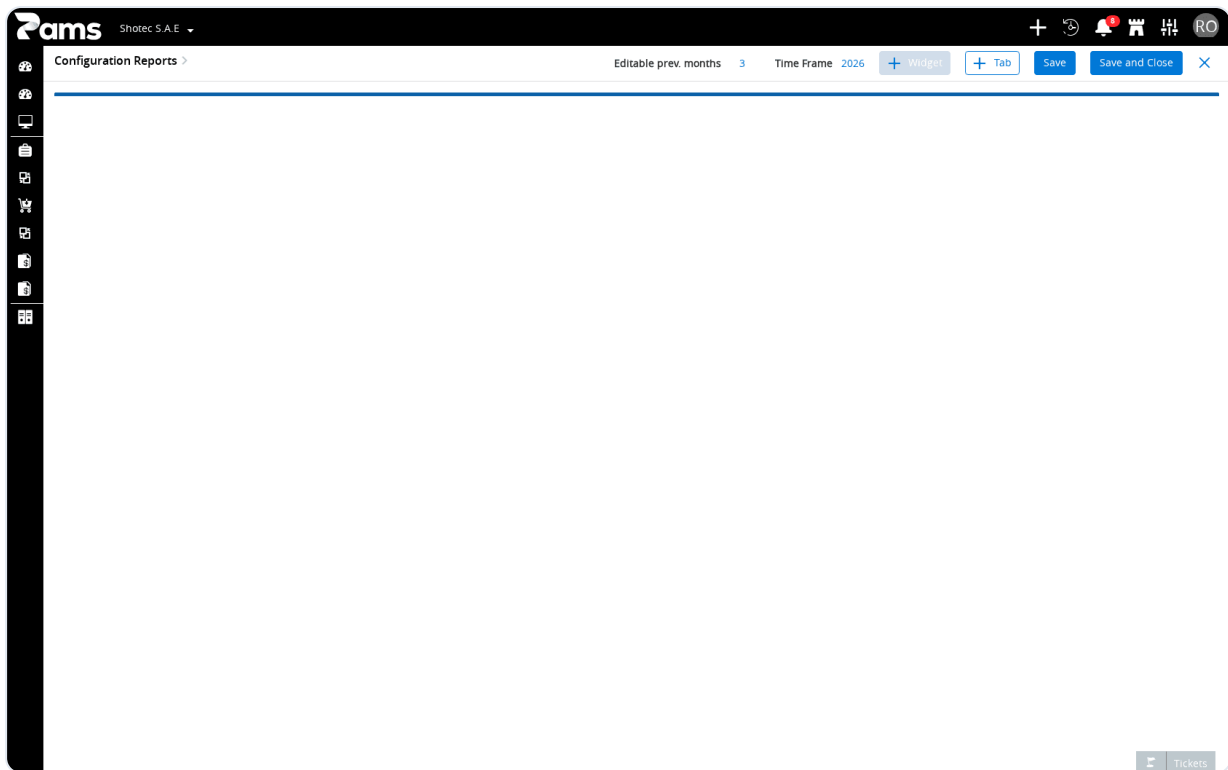
The screen combines report-content controls with two option readouts.

Field or readout	Type and rule	When it appears
Editable prev. months	Clickable value; no required rule	Edit mode
Time Frame	Clickable value; no required rule	Edit mode
Another role dashboards	Each choice is rendered as the dashboard name returned for a saved report view belonging to another role; the current dashboard and views without saved report content are excluded.	Import popup
Select tab(s)	Checkbox group; no required rule	Import popup after a source report has selectable tabs
All (Replace existing tabs)	Checkbox; no required rule	A selected source report has one or more tabs
number of editable Prev. months	Number; no required rule; minimum <code>1</code> , maximum <code>11</code>	Previous-months popup

Each option is the dashboard name of a saved report view from another role. The current dashboard and views without saved report content are excluded.

The page displays the current values for **Editable prev. months** and **Time Frame**. The page displays **Widget**, **Tab**, **Save**, and **Save and Close**.

The page does not mark these controls as required. The tab choices also include inactive entries for Principals Report and Eagle View; they are not available actions.



If you need to...	Select
Add a report widget	Widget
Open tab choices	Tab
Save and remain on the page	Save
Save and leave the page	Save and Close
Review saved changes	Last Modifications , when available

Configure report tabs and options

Use **Widget**, **Tab**, and **Time Frame** to arrange the report view.

Prerequisites

- You are on `/configuration/reports-settings/new`.
- The page is in edit mode.
- You know whether you are adding a widget, adding a tab, importing tabs, or changing an option.

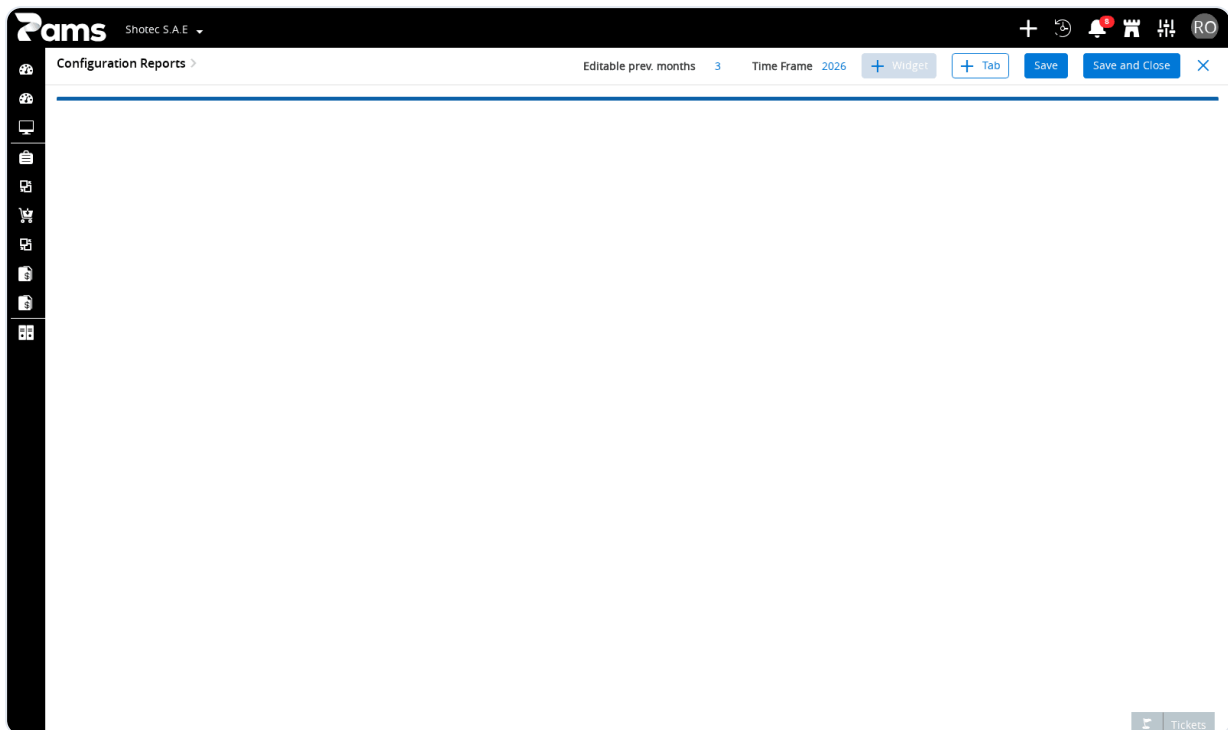
Steps

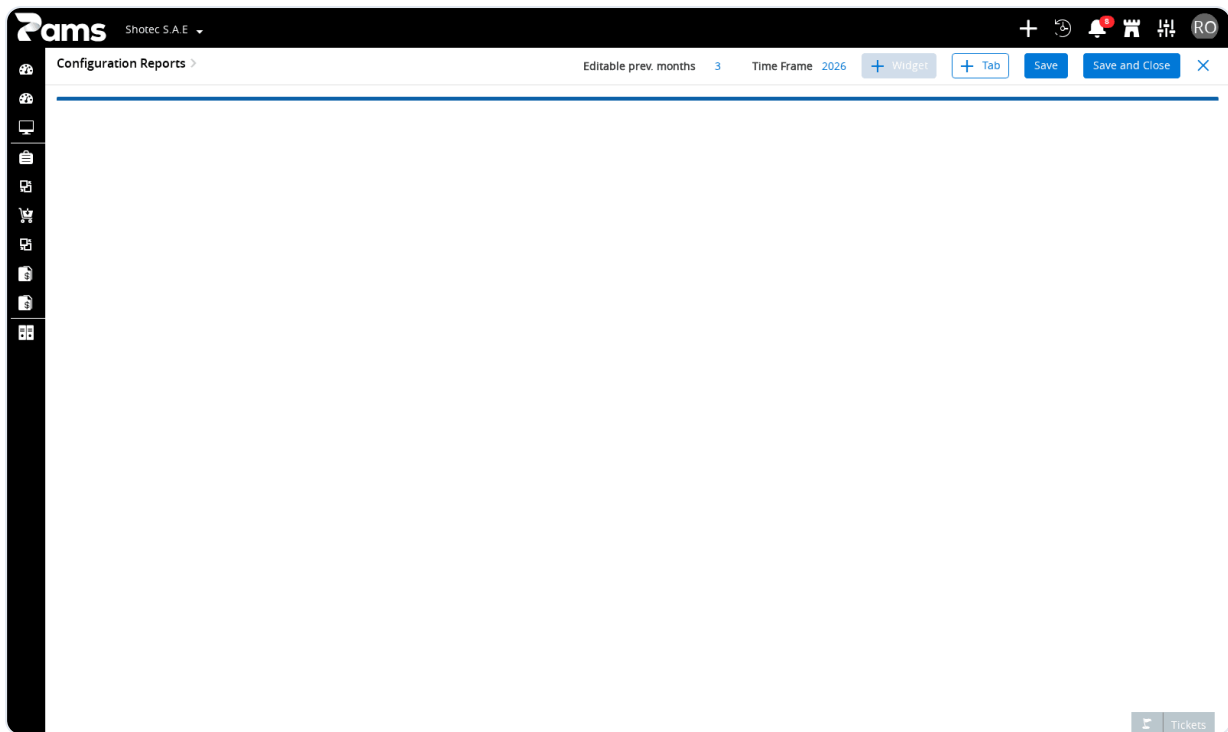
1. Select **Widget** to open the widget-adding flow when the setting has a report tab.

2. Select **Tab** to open the tab choices.
3. Choose one route from the tab choices.

If you need to...	Select
Create a blank tab	Blank Tab
Import tabs from another report setting	Import From

4. Select **Editable prev. months** to open the previous-months option.
5. Enter a number from **1** through **11** in **number of editable Prev. months**.
6. Select **Time Frame** to open the time-frame choices.





Result: The selected tab or widget change and its options are ready to save.

Handle import and conditional report-setting branches

The import route copies report tabs from another saved source.

Surface	Appears when
Another role dashboards	The import popup is open
Select tab(s)	A source report has one or more selectable tabs
All (Replace existing tabs)	A source report has one or more selectable tabs
number of editable Prev. months	The previous-months popup is open

Prerequisites

- You are in edit mode.
- You have a source report available for the import route.

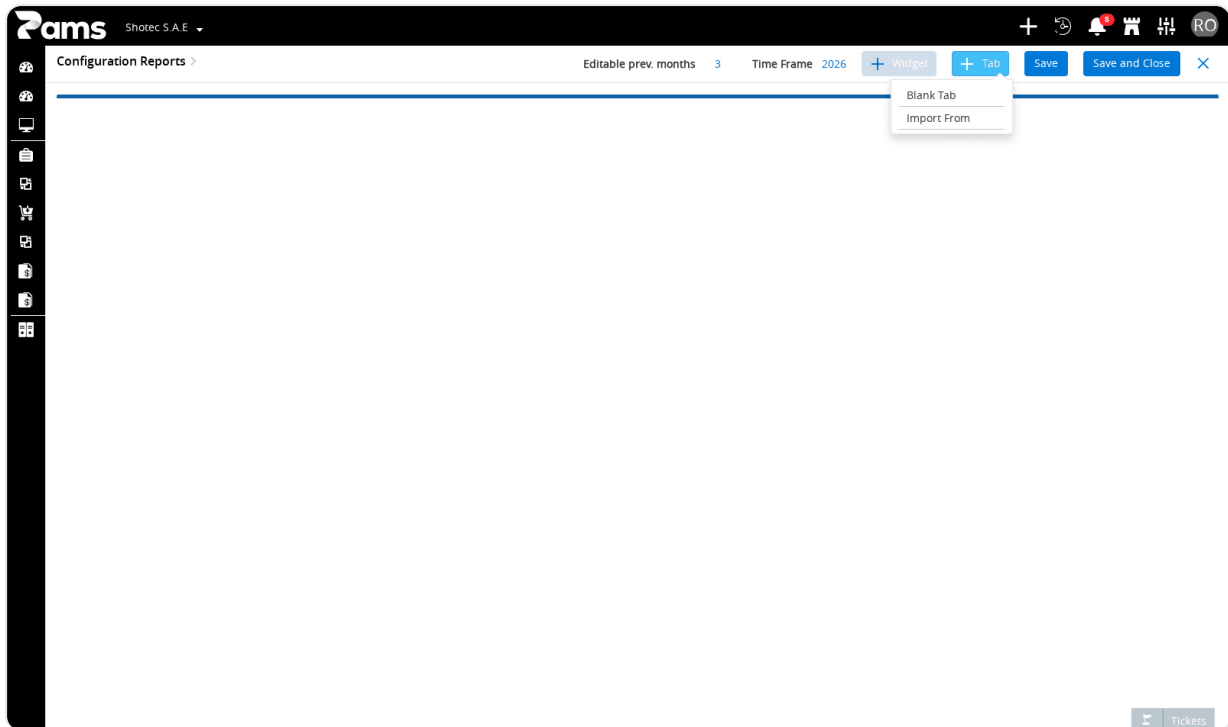
Steps

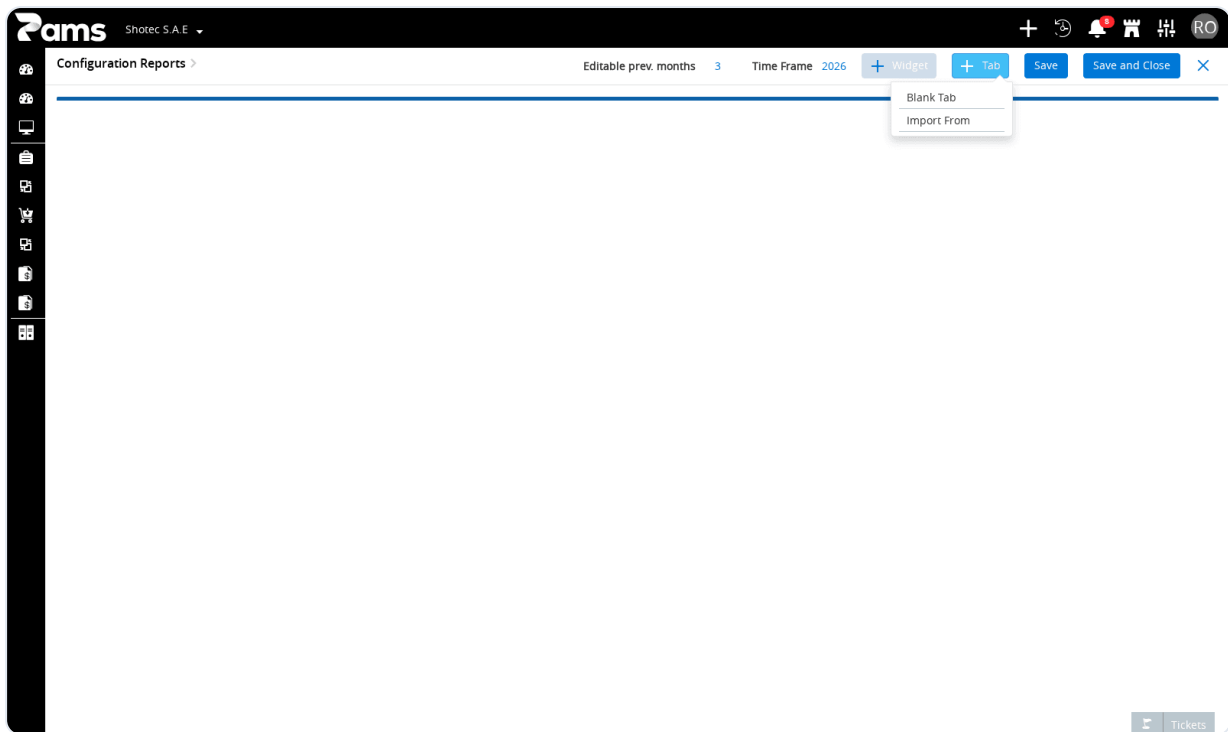
1. Select **Import From**.
2. In **Another role dashboards**, select a dashboard name. The options are the dashboard names returned for saved report views belonging to other roles; the current dashboard

and views
without saved report content are excluded.

3. Choose how to select the imported tabs.

If you need to...	Select
Replace the existing tabs with all tabs	All (Replace existing tabs)
Choose specific tabs	Individual checkboxes under Select tab(s)





Result: The selected report tabs are prepared for the report setting.

Save and review the report setting

After a successful save, the page refreshes modification history. Use **Save** to remain on the page, or **Save and Close** to leave after saving.

Prerequisites

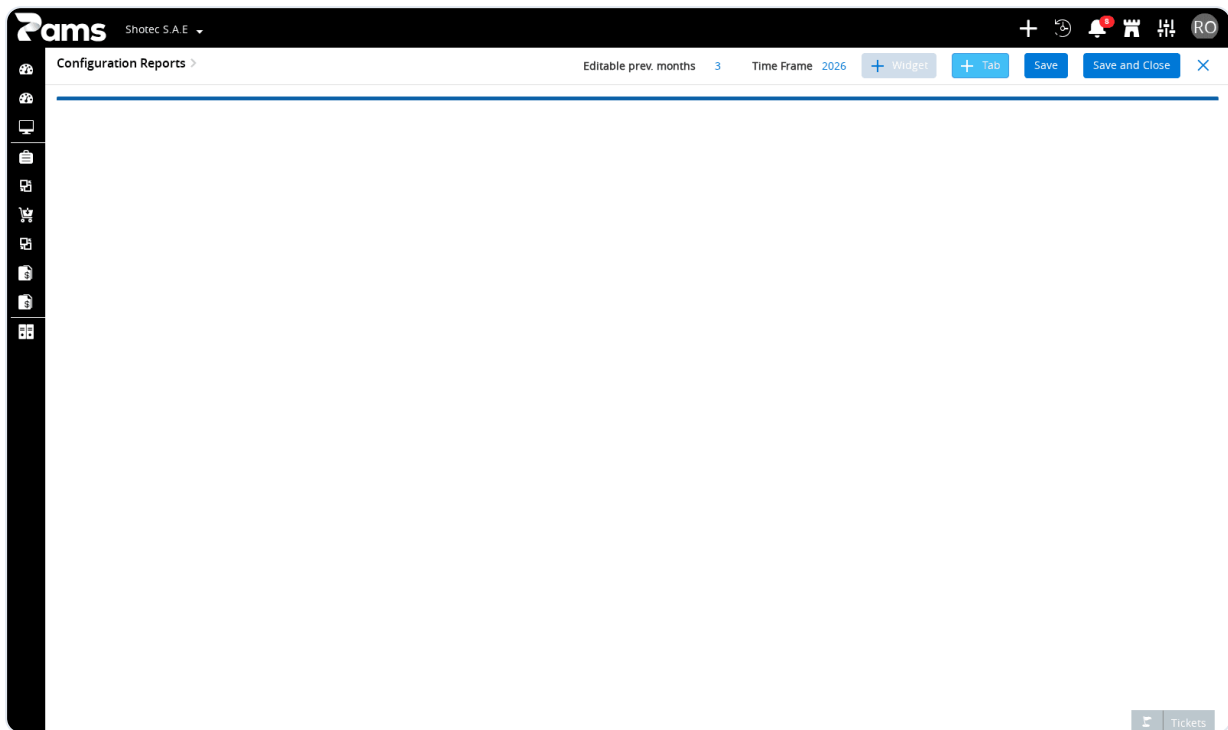
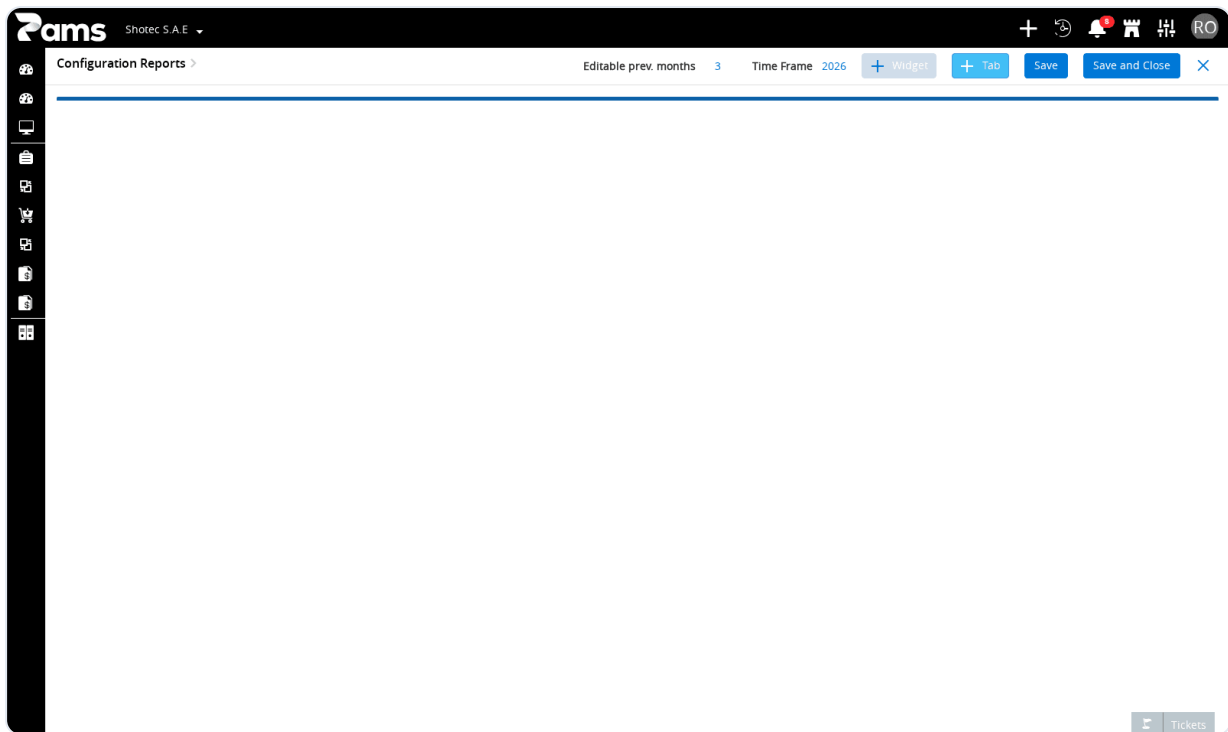
- You have completed the tab, widget, and option changes you want to keep.
- You are on the report-setting page in edit mode.

Steps

1. Select one save action.

If you need to...	Select
Save and remain on the page	Save
Save and leave the page	Save and Close

2. Read the result message.
3. Select **Last Modifications** when the history area is available.



Result: A successful save displays `Your request was completed successfully`, and the page refreshes modification history.

When saving or navigation goes wrong

Use the exact message to identify the branch you are in, then apply the corresponding action.

What you see	What it means	What to do
Your request was completed successfully	The save sequence completed	Continue on the page or select Save and Close
An error occurred while processing your request	A save request returned an error	Review the setting values and select Save again
You already have this tab in this dashboard	The selected tab already exists	Choose a different tab or review existing tabs
The import choices are not shown	The import area does not currently show its selectable source or tab area	Open Import From again
Last Modifications is not available	The history area is unavailable in the current page state	Continue with the report-setting work and review history when available

Continue after saving

After saving, use [Reports settings](#) to locate the saved setting. When it needs maintenance, open [Edit report setting](#).