

Reports

September 10, 2026

Reports

A report view is the set of report tabs and widgets configured for your role. Use Reports to open your report view, choose a reporting period, and review its widgets.

Reports overview

Reports is the reader-facing hub for reviewing the report view configured for your role. Open it from the application menu.

If you need to...	Go to
Open the Reports hub	Open Reports
Understand the controls on the page	Understand the Reports screen
Choose a reporting period	Choose a report time frame
Locate or open report widgets	Review and organize report widgets
Review the report page	Report overview
Review widget details	Report widget catalog
Review management report widgets	Management report widgets
Generate a principal report	Principals Report
Configure administrator-prepared report settings	Reports settings

Before you start

The Reports page shows the report view and controls available for your role and subscription.

The page can show administrator-prepared role reports, a subscription-upgrade surface, or an empty-report message.

Prerequisites

- You have access to the Reports page.
- A report view is configured for your role when you need to review widgets.
- Your subscription includes the Reports library.
- The role report is not in edit mode when you need to choose a time frame.

Open Reports

Reports is the application page where your configured report view opens.

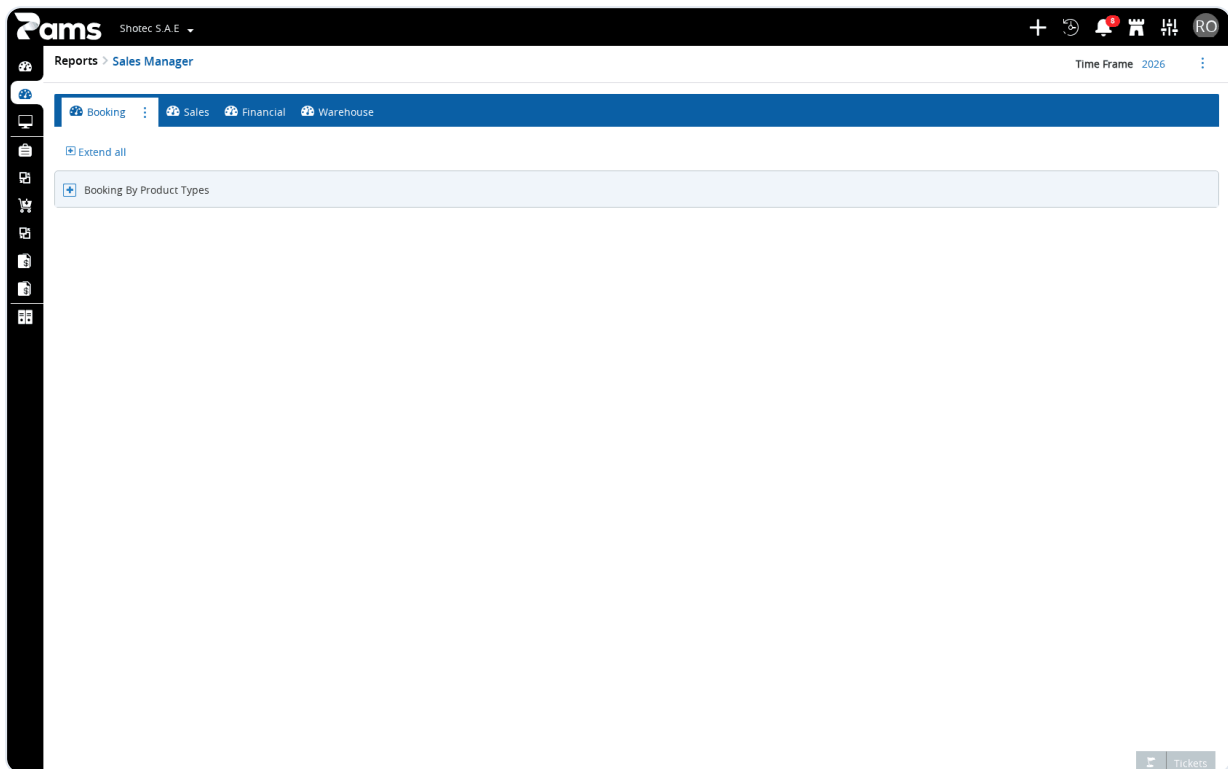
Prerequisites

- You are signed in.

Steps

1. In the application menu, select **Reports**.
2. Confirm that the **Reports** heading and the report tabs are visible.

If more than one administrator-prepared role report is listed, select the role report that contains the information you need.



Result: The Reports page opens with the report view available to your role.

Understand the Reports screen

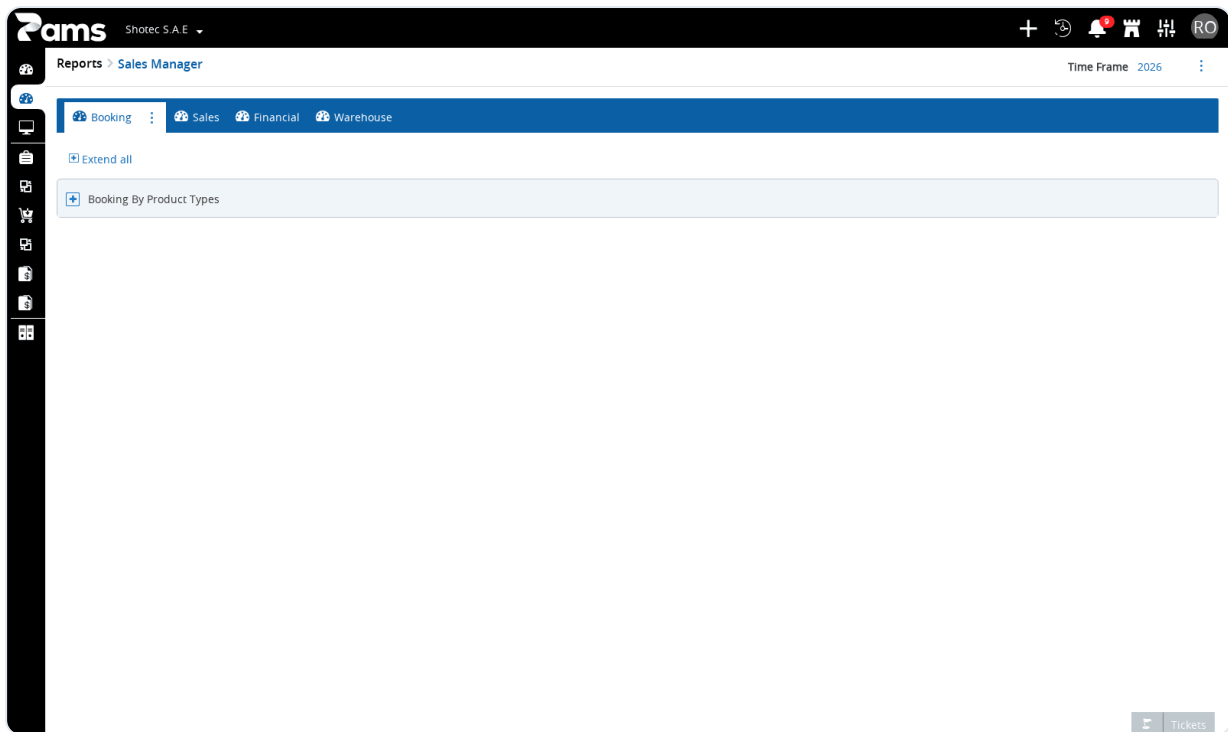
The Reports screen combines a time-frame control, report tabs, widget controls, and the widgets assigned to the active tab.

The Reports screen can show configured report tabs and widget titles.

Area	What you can use it for	Availability
Time Frame	Open the report-period choices	Available when the report view is not in edit mode
Report tabs	Switch between configured report views	Available when report tabs exist
Content:	Open the active tab's widget menu	Available when the active tab has widgets
Search for widget	Filter the widget entries	Available in the active tab's widget menu
Extend all	Open the selected widgets	Available when selected widgets exist and some are closed
Collapse all	Close the selected widgets	Available when at least one selected widget is open

The active tab can also expose **Rename tab** and **Delete tab** while it is in edit mode.

The widget picker uses a thumbnail and a title for its visible widget entries. Use **Time Frame** to choose a period, report tabs to switch views, and the widget controls to open or close the views assigned to the active tab.



Choose a report time frame

The report time frame determines which period the Reports view uses for its displayed figures.

Prerequisites

- The Reports page is open.
- **Time Frame** is available outside edit mode.

Steps

1. Select **Time Frame**.
2. Choose one period from the available choices.

If you need to...	Select
Use the current year	This year
Use a specific year	Definite year
Use the rolling twelve-month period	last 12 months

3. If you selected **Definite year**, enter a year from **2024** through the current year.
4. Select **OK**.

If **Definite year** is required and the field is empty, the page uses the message

This Field Is Required .

Result: The Reports time-frame popup contains the period you selected and the corresponding year when **Definite year** is selected.

Review and organize report widgets

Report widgets are the individual report views available inside the active report tab. Use the widget menu to locate a widget, then use the panel controls to open or close widgets.

Prerequisites

- The Reports page has an active report tab with widgets.

Steps

1. Open the active tab's **Content:** menu.
2. Enter a widget title in **Search for widget**.
3. Select **Select all** when the widget picker is open and you want every listed widget selected.
4. Choose the panel action that matches your review:

If you need to...	Select
Open the selected widgets	Extend all
Close the selected widgets	Collapse all
Remove a widget while editing the tab	Remove widget from tab

When a widget is already present in the tab, the page can show

You already have this widget in this tab . Removing a widget can open the confirmation message You are about to exclude this widget from this tab. Are you sure? .

Result: The active tab shows the widget panels in the open or closed arrangement you selected.

Handle report branches and errors

Reports can show different surfaces according to the report view, role, subscription, and editing conditions in force.

If you see...	Use this guidance
The report library	Review the configured report tabs and widgets.
A subscription-upgrade surface	Follow your organization's subscription process before using the library.
Your role has no report	Contact your administrator using the instruction shown below the message.
Rename tab or Delete tab	You are working in an editable report tab. Open the required tab action.
No separate-branch controls	Continue with the controls that are visible on the Reports page.

The empty-report branch displays **Your role has no report** and

Kindly, Contact your administrator to define a report .

Controls that are unavailable in the current report view do not appear on the page. Administrator-prepared report settings are handled in [Reports settings](#).

If more than one report tab is available for the edit action, the edit-tab popup can show the

confirmation message Are you sure you want to ultimately delete this tab and all it's content ? .

Result: You use the branch shown for your role instead of following controls from a different report view or editing state.

When Reports does not show what you need

Use this table when a report action stops or a branch does not appear.

What you see	What it means	What to do
This Field Is Required	A required report field is empty.	Enter the required value, then select OK .
Your role has no report	No report is configured for the current role.	Contact your administrator using the instruction shown below the message.
You already have this widget in this tab	The selected widget is already in the tab.	Choose a different widget or continue with the widget already in the tab.

What you see	What it means	What to do
You are about to exclude this widget from this tab. Are you sure?	The selected widget is being removed from the tab.	Stop and review the widget selection before confirming the removal.
Your request was completed successfully	The requested operation completed.	Continue with the updated Reports surface.
An error occurred while processing your request	The requested operation did not complete.	Review the current report view and try the action again.
Are you sure you want to ultimately delete this tab and all it's content ?	The tab and all its content are being deleted.	Continue only when you intend to delete the tab.

Result: You can match the message or unavailable control to the next action without treating an unavailable branch as a different Reports workflow.

Continue from Reports

Reports is a review hub rather than a record-lifecycle page. Continue to the page that owns the next job:

- For widget names and descriptions, open [Report widget catalog](#).
- For management-focused widget use, open [Management report widgets](#).
- For a principal-facing report, open [Principals Report](#).
- For administrator-prepared report settings, open [Reports settings](#).
- For creating a report setting, open [New report setting](#).
- For editing a report setting, open [Edit report setting](#).