

Organize Dashboards and Reports

Last Modified on 03/10/2022 4:26 pm EST

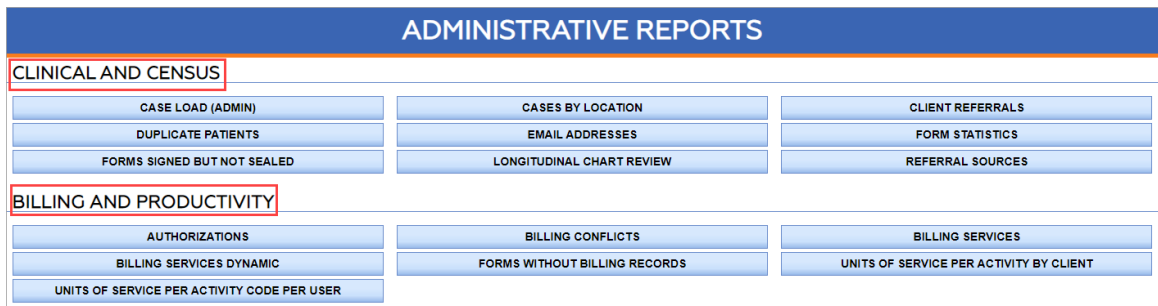
Path: Main Menu > Admin Tools Menu > Report Menu Setup (or Menu Setup)

About

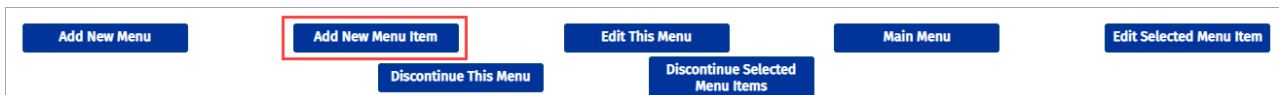
Administrators can access Report Menu Setup (or Menu Setup), where dashboards and reports can be organized within NextStep. Please note, if you move the location of the report, some pathways listed on Help Center articles will not be applicable to your Agency.

Create a new Group

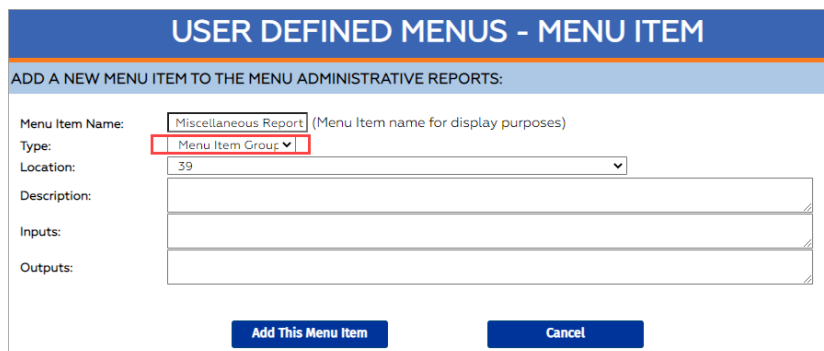
Example



1. Navigate to Report Menu Setup by following the path above.
2. Choose a menu option from the **Select Menu** drop-down.
3. Click the **Add New Menu Item** button.



4. In the **Menu Item Name** field, type the name you want to use for the new grouping.
5. From the **Type** drop-down menu, select **Menu Item Group**.



6. Click the **Add This Menu Item** button.

Assign Dashboards and Reports to a Group

1. Navigate to Report Menu Setup by following the path above.

2. Choose a menu option from the **Select Menu** drop-down that you want to organize.
3. In the **Select Menu Item(s)** column, select the checkbox for the dashboard/report you want to edit.

REPORT MENU SETUP

SELECT MENU: Administrative Reports

MENU PROPERTIES:
 Menu Name: Administrative Reports

MENU ITEMS:

Select Menu Item(s)	Order	Group	Item	Link	Vars
<input type="checkbox"/>	▲▼ 1		Clinical and Census	(This is a group)	
<input type="checkbox"/>	▲▼ 2		Billing and Productivity	(This is a group)	
<input type="checkbox"/>	▲▼ 3		Technical Administration	(This is a group)	
<input type="checkbox"/>	▲▼ 4	Clinical and Census	Case Load (Admin)	Dashboard.aspx	Name=UserCaseLoad&Refresh=10&fullscreen=true
<input checked="" type="checkbox"/>	▲▼ 5	Clinical and Census	Cases By Location	ReportViewer.aspx	ReportName=ReportCasesByLocation

4. Click the **Edit Selected Menu Item** button.

Add New Menu

Add New Menu Item

Edit This Menu

Main Menu

Edit Selected Menu Item

Discontinue This Menu

Discontinue Selected Menu Items

5. From the **Group** drop-down menu, select the group heading that you want the dashboard/report to be displayed under.

USER DEFINED MENUS - MENU ITEM

EDIT MENU ITEM (MENU ITEM BELONGS TO MENU ADMINISTRATIVE REPORTS):

Menu Item Name: (Menu Item name for display purposes)

Prompt:

Type:

Location:

URL:

Description:

Inputs:

Outputs:

Group:

Variables to Pass:

Window Type:

Update This Menu Item and Return

Return Without Menu Item Level Updates

6. Click the **Update This Menu Item and Return** button.