Organize Dashboards and Reports

Last Modified on 03/10/2022 4:26 pm EST
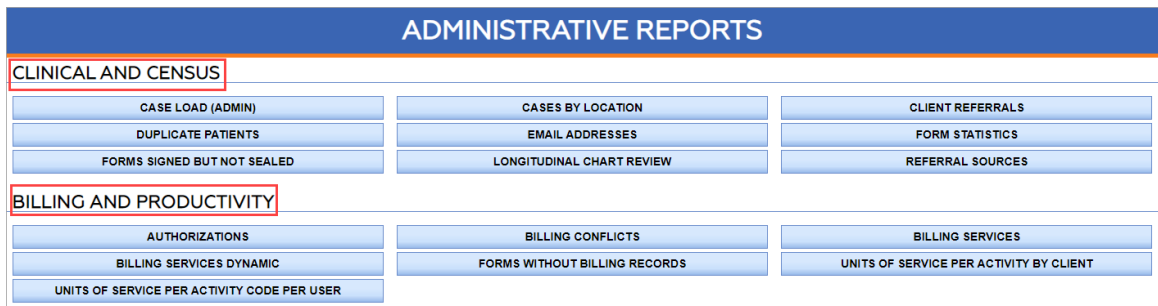
> **Path: Main Menu > Admin Tools Menu > Report Menu Setup (or Menu Setup)**
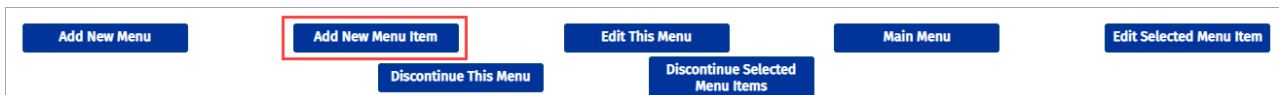
About

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.
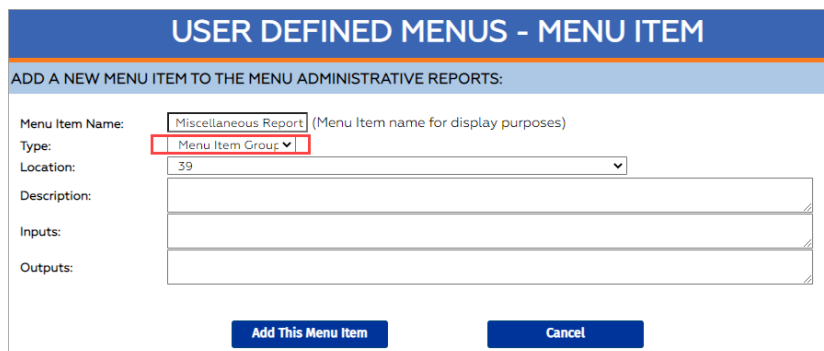
Create a new Group

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.

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

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

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