Inline Editing

Editing a record directly from a report is possible with inline editing.

Editing inline on a report

To edit inline on a report:

1. Navigate to a report with records that you want to edit. Note: this can be a report in navigation area, a report on the screen or a report on a form.

2. Select **EDIT INLINE** in the Action menu bar.

3. Edit the fields as required. Edited rows appear highlighted in green.

   - Select **SAVE CHANGES** to save the changes.

   - Select **DISCARD CHANGES** to discard the changes.

Check

- Green rows show successful saves.
- Red rows show unsuccessful saves. A save is unsuccessful if it does not conform to the validation rules on the form (for example leaving a mandatory field blank).

Tip

After selecting **EDIT INLINE** select a row to set focus on the first cell. Press the Up/Down arrows to change rows being edited and press Tab to move across cells being edited.

Editing restrictions

Please refer to the notes below for details on inline editing behaviour.

In some cases, inline editing may not be available on certain cells.

Fields Types

Only the following field types can be edited inline:

- Text
- Multiline Text
- Number

- Autonumber

- Decimal

- Currency

- Date & Time

- Date

- Time

- Yes/No

- Choice

- Lookup

Conditions

To be able to inline edit a cell, the following conditions must be met:

- The field must be on the form that is assigned to the report, see Report Properties

- The field must be editable on the form that is assigned to the report i.e. must not be read-only

- The logged in user must have access to edit the record, see Record Access