Action Menus

Adding an action to the menu

To add an action to the Actions menu:

Action menus are configured in Report Builder mode.

1. Go to Report Builder .
2. Select **ACTIONS**. The Actions dialogue appears.
3. Select the checkbox next to the action you want in the**Enable** column. The action is enabled for Record and Report. The enabled actions appear in the Actions menu of the report.
4. Select the checkbox next to the action in the**Show Button** column. The action appears as a button at the top of the report header.

Actions

The following set of actions displays in the Actions dialogue for Record and Report actions.

Record Actions	Report Actions
New (All)	Edit Inline
New	Export (All)
View	Export to Excel
Edit	Export to CSV
Delete	Export to Word
Workflow name (if any)	
Export	

Record Actions

Actions that can be performed on every individual record of the report.

1. **New (All)**: create a new record for the derived type of the object
2. **New**: create a new record for the report
3. **View**: go to view mode of the selected row on the report
4. **Edit**: go to edit mode of the selected row on the report
5. **Delete**: delete the selected row on the report
6. **Workflow name**: run the workflow on the selected row from the view mode of the report
7. **Export**: export the selected row of the report. Please note that only the selected row will be exported in XML format, not the entire report

Report Actions

Actions performed on the whole report **not** just for an individual record of the report.

1. **Edit Inline**: Edit Inline appears as a menu option on the report and allows to edit individual record on the report without going to the edit mode of the record
2. **Export (All)**: Export (All) appears as a button on the report and gives the option to export the report to Excel, CSV and Word
3. **Export to Excel**: export the report to Excel
4. **Export to CSV**: export the report to CSV
5. **Export to Word**: export the report to Word