

Settings

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Configure Report Settings

Who can use this feature?

Users with permission to CollaborateMD Reports.

Report Settings enable you to configure global default report settings for a practice/customer or a specific user in your account. These settings allow you to really personalize and make the reports screen work for you and your workflow.

1. Select **Reports > Settings**.
 2. Click **Edit**.
 3. Select your preference for **Close open report tabs when switching customers?**
 1. If set to **Yes**, any open report will close when you switch to another customer account
 4. Select your preference for **Search by categories when searching for reports in the Report Viewer?**
 1. If set to **Yes**, it will show matches based on report categories as well as the report titles when using the search field within the Reports Viewer screen.
 5. Select your preference for **Show an indicator when duplicate columns are present on a report in the Report Builder?**
 1. If set to **Yes**, it will show a tooltip when duplicate columns are present on a report in the Report Builder.
 6. Click **Save**.
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