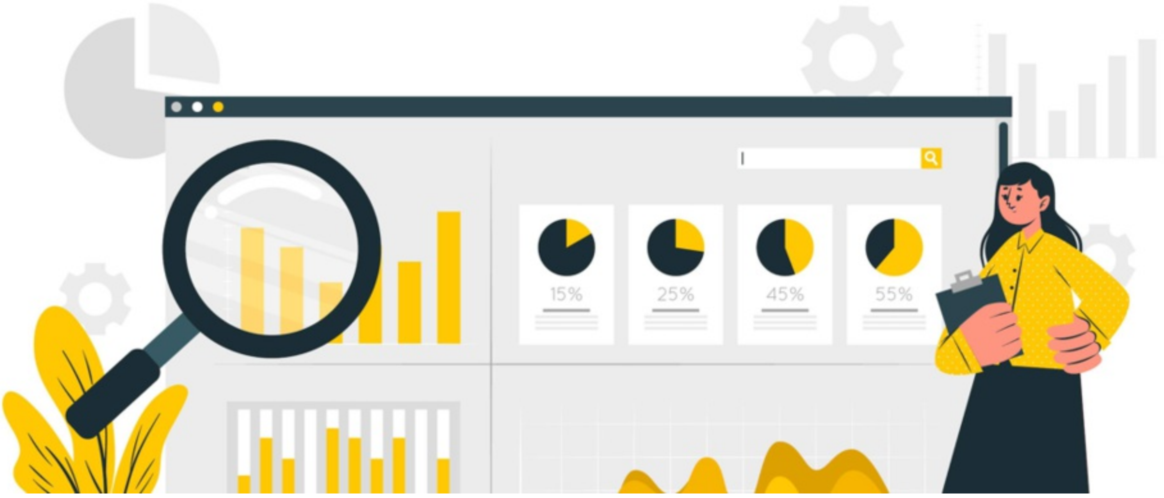
Link to article: https://discover.claromentis.com/knowledgebase/articles/742



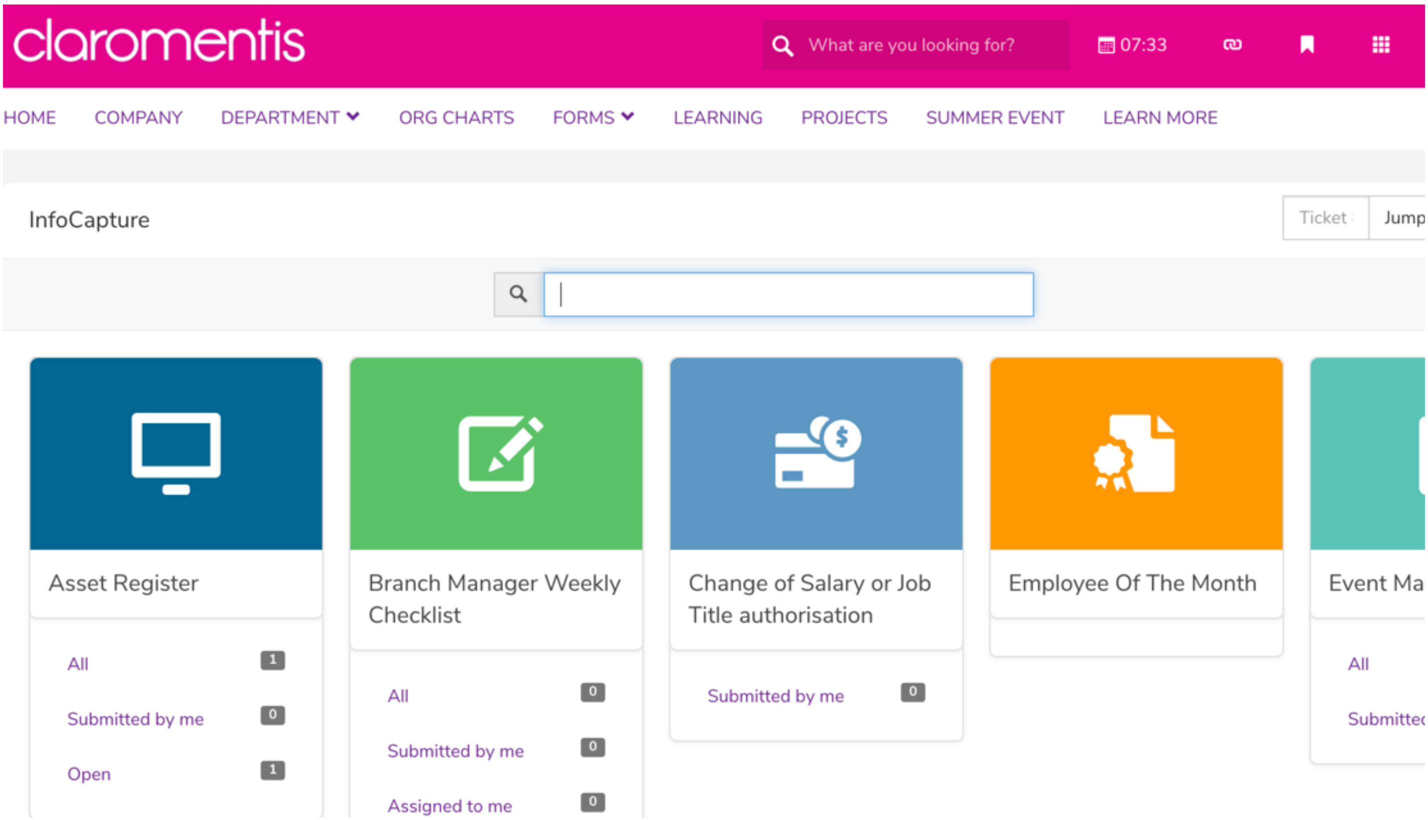
Infocapture report permissions

Included in this article:

- Report permissions (part 1)
- Report permissions (part 2)

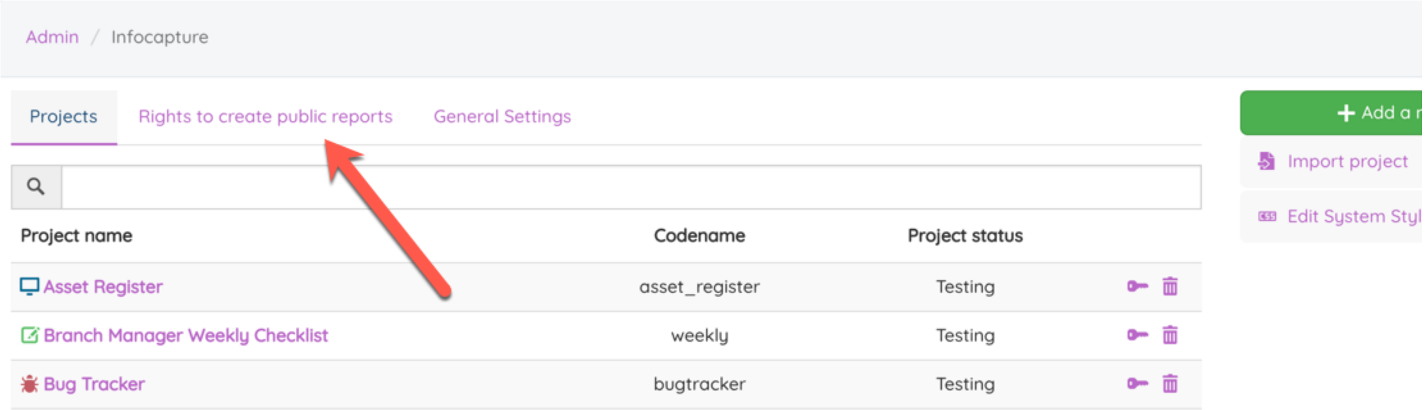
1- Report permissions (part 1)

As standard, all users will have the reports icon in the front end of InfoCapture:

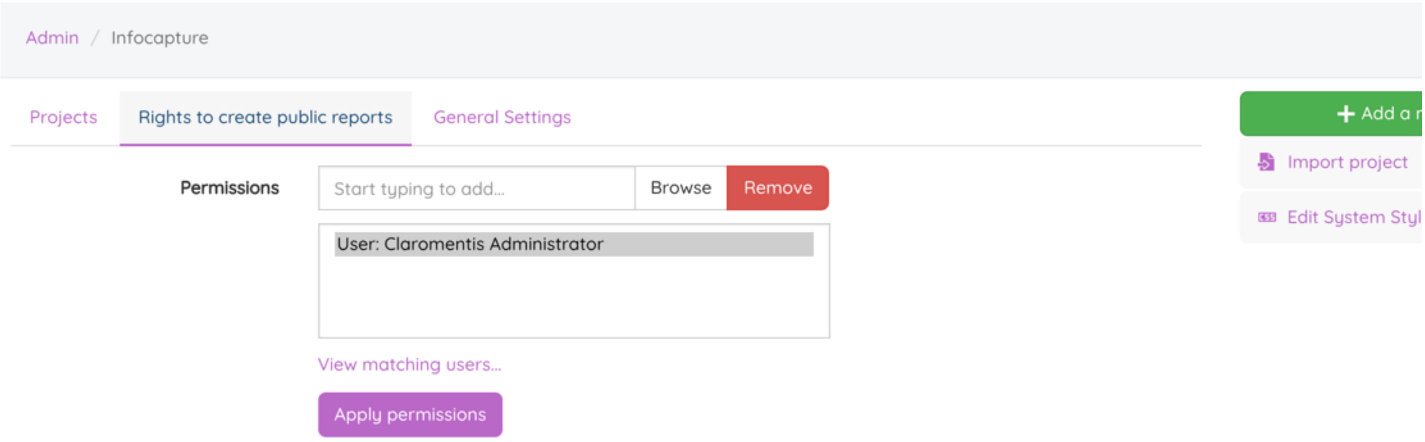


In the scenario that you would like a user to view some reports you have created, **you** will need to have permission to create public reports. This is done via the admin side of an InfoCapture project, if your name is in the box shown in the below image, you will be able to allow other users to view the reports you have made.

By default, if users aren't added here, any reports they create will only be visible to themselves.

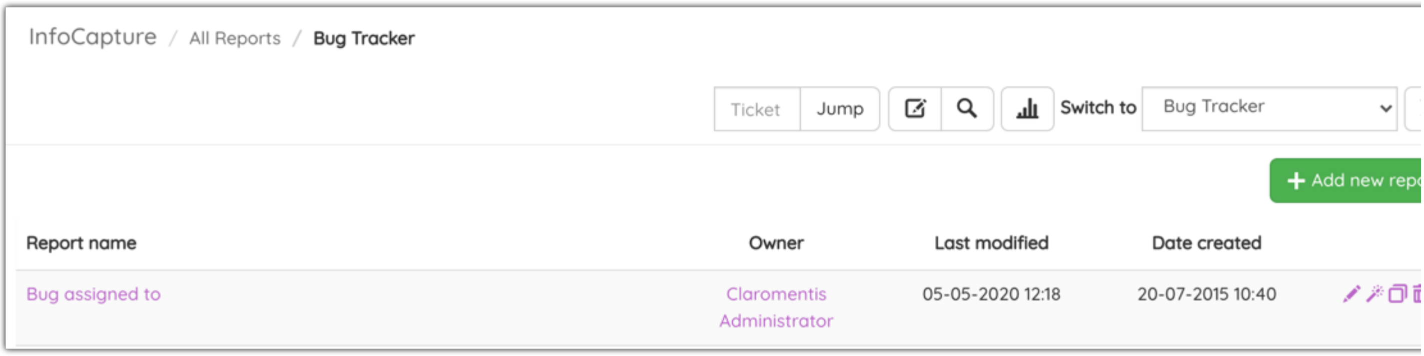


Add the names of users who will need to share their reports here:

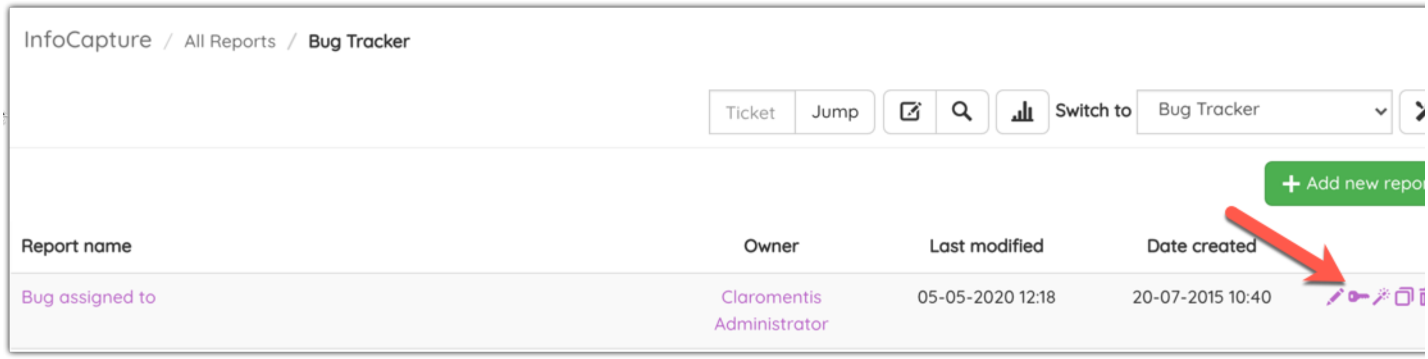


Once this permission has been granted, the user will now see a key icon for any reports they have made.

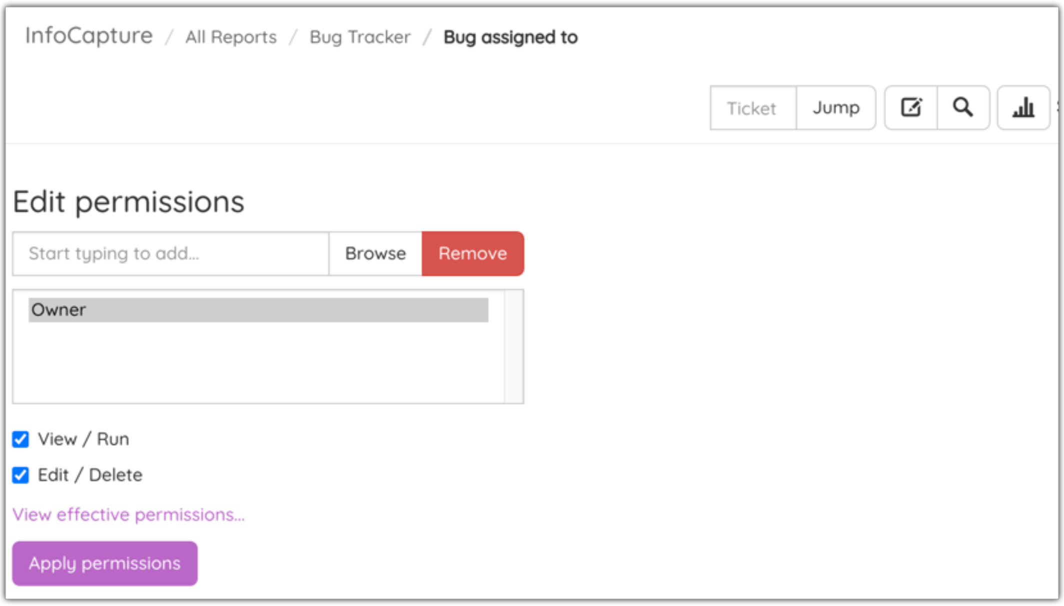
Before:



After:

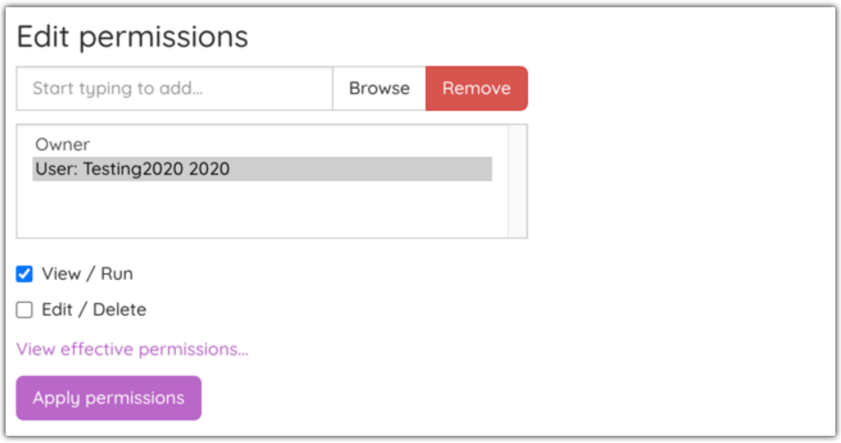


If the owner clicks this key, they will be able to grant other users these permissions:

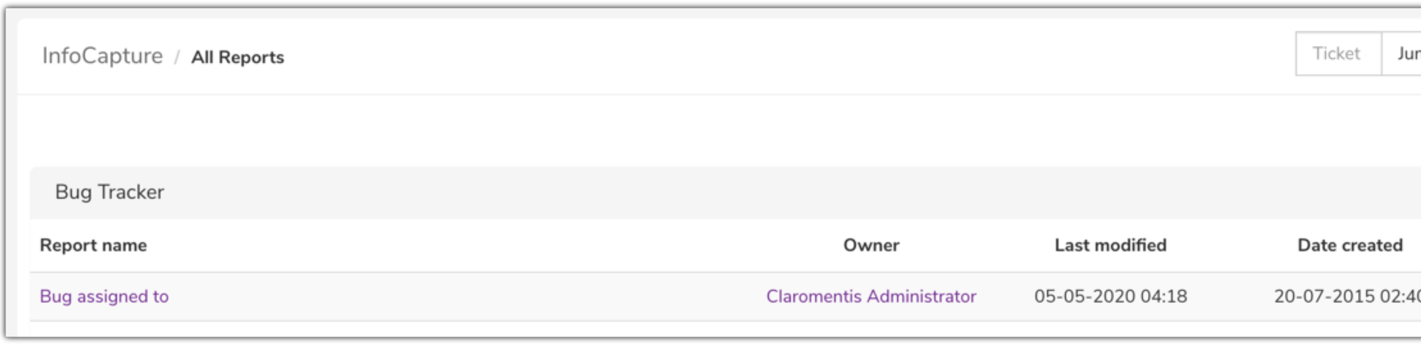


Please note: It is not possible to give another user ownership of this report, only the report creator will ever have the key symbol. If a user who owns the reports is due to leave the business they can enable other users to duplicate these reports like so:

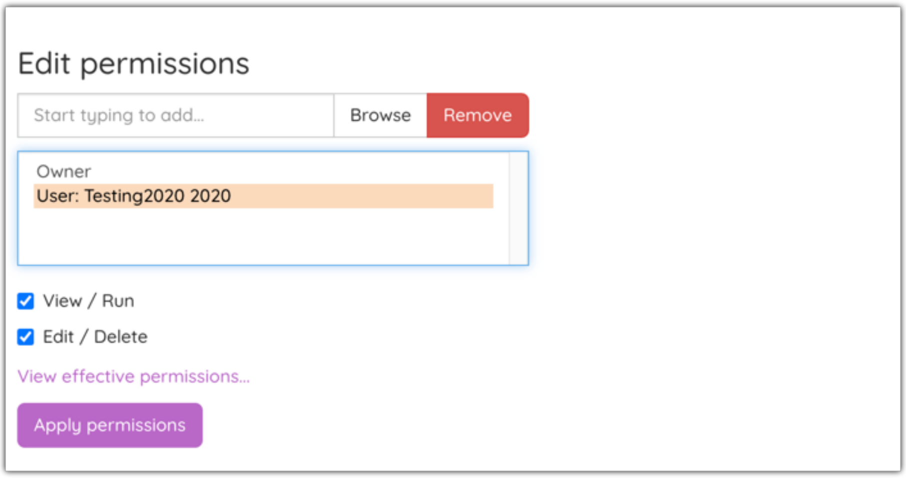
View / Run permission:

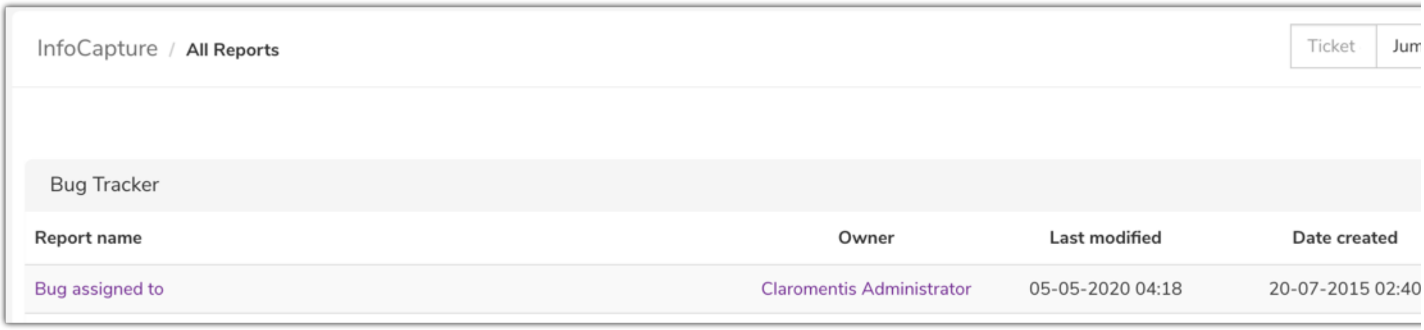


This permission is sufficient in allowing the user to make a duplicate of the report:



Edit / Delete permission:



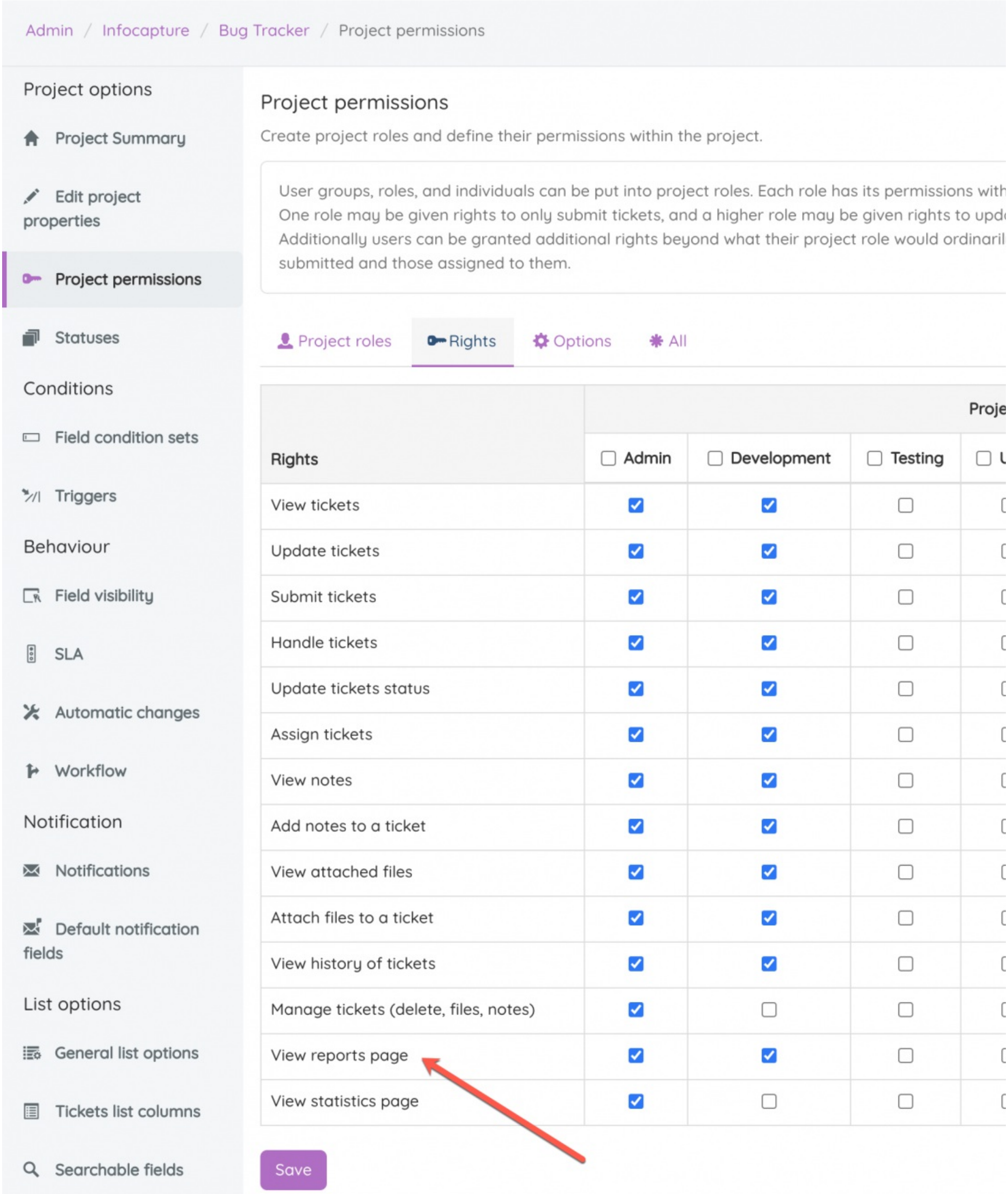


This permission enables the users to:

- Edit the name of the report
- 'Run Wizard' which simply means edit the configuration of the report
- Duplicate the report
- Delete the report

2- Report permissions (part 2)

In addition to this, as the data from these reports are being pulled from specific InfoCapture forms, the user will need to be granted the 'View reports page' permission for every form in which they need to be able to view any relevant reports:



To begin creating reports, you may find this guide helpful.

Please note: the project specific reports button will only appear on the front end if there is a report already created for that project to show.

Related Article

Creating a report

Created on 7 July 2020 by Hannah Door. Last modified on 20 June 2024

Tags: infocapture, report, reports