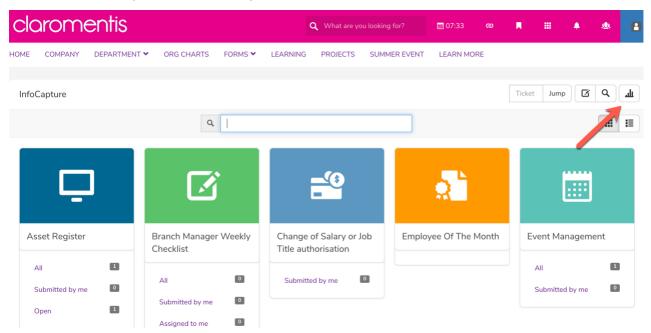


Included in this article:

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

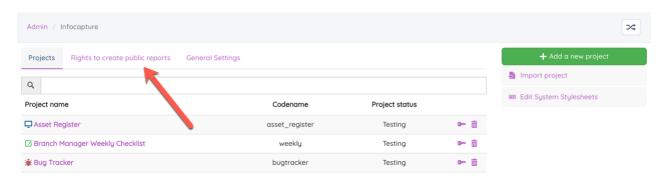
1- Report permissions (part 1)

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

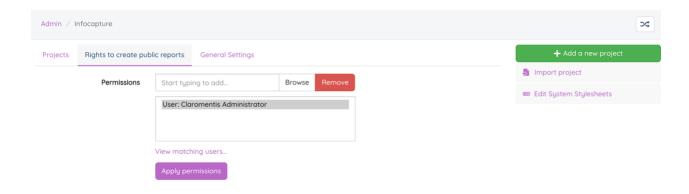


In the scenario that you would like a user to view some reports you have created, you will need to have permission to create public reports. This is done via the admin side of an InfoCapture project, if your name is in the box shown in the below image, you will be able to allow other users to view the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

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

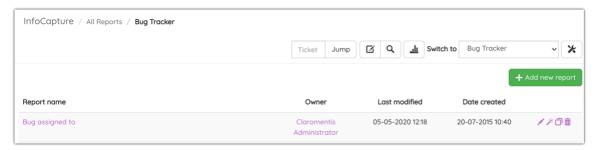


Add the names of users who will need to share their reports here:



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

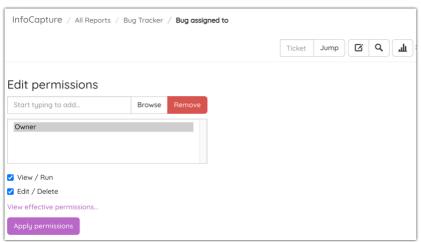
Before:



After:

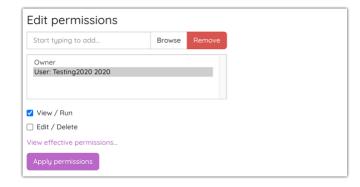


If the owner clicks this key, they will be able to grant other users these permissions:

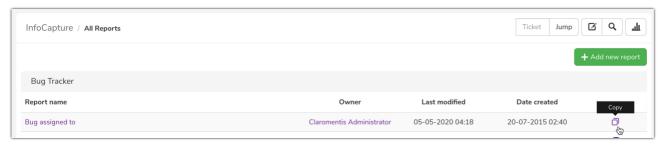


Please note: It is not possible to give another user ownership of this report, only the report creator will ever have the key symbol. If a user who owns the reports is due to leave the business they can enable other users to duplicate these reports like so:

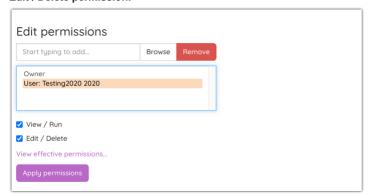
View / Run permission:



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:

Project options	Project permissions						
A Project Summary	Create project roles and define their permissions within the project.						
Edit project properties	User groups, roles, and individuals can One role may be given rights to only su Additionally users can be granted addi	ıbmit tickets, ar	nd a higher role may b	e given rights	to update and	assign them, for example.	oer:
Project permissions	submitted and those assigned to them.						
Statuses	♣ Project roles ♣ Rights ♠ Open	otions * Al					
Conditions		Project role					
Field condition sets	Rights	☐ Admin	☐ Development	☐ Testing	☐ Users	☐ Submitter of ticket	
*// Triggers	View tickets	■	✓			~	
Behaviour	Update tickets		✓			☑	
☐ Field visibility	Submit tickets		✓				
• SLA	Handle tickets						
★ Automatic changes	Update tickets status						
Automatic changes	Assign tickets						
I → Workflow	View notes						
Notification	Add notes to a ticket						
Notifications	View attached files					☑	
☑ Default notification fields	Attach files to a ticket	✓	✓			✓	
	View history of tickets	✓	✓			✓	
List options	Manage tickets (delete, files, notes)	Z					
General list options	View reports page	Z	✓				
Tickets list columns	View statistics page	Z					

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

Last modified on 10 July 2024 by Veronica Kim

Created on 7 July 2020 by Hannah Door Tags: infocapture, report, reports