



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:

InfoCapture

Ticket Jump [Reports Icon] [Search Icon] [Bar Chart Icon]

[Search Bar]

Asset Register

- All 1
- Submitted by me 0
- Open 1

Branch Manager Weekly Checklist

- All 0
- Submitted by me 0
- Assigned to me 0

Change of Salary or Job Title authorisation

- Submitted by me 0

Employee Of The Month

Event Management

- All 1
- Submitted by me 0

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.

Admin / Infocapture

Projects Rights to create public reports General Settings

[Search Bar]

Project name	Codename	Project status
Asset Register	asset_register	Testing
Branch Manager Weekly Checklist	weekly	Testing
Bug Tracker	bugtracker	Testing

+ Add a new project

Import project

Edit System Stylesheets

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

Admin / Infocapture

Projects

Rights to create public reports

General Settings

Permissions

Start typing to add... Browse Remove

User: Claromentis Administrator

View matching users...

Apply permissions

+ Add a new project

Import project

Edit System Stylesheets

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

Before:

InfoCapture / All Reports / Bug Tracker

Ticket Jump

Switch to Bug Tracker

+ Add new report

Report name	Owner	Last modified	Date created
Bug assigned to	Claromentis Administrator	05-05-2020 12:18	20-07-2015 10:40

After:

InfoCapture / All Reports / Bug Tracker

Ticket Jump

Switch to Bug Tracker

+ Add new report

Report name	Owner	Last modified	Date created
Bug assigned to	Claromentis Administrator	05-05-2020 12:18	20-07-2015 10:40

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

InfoCapture / All Reports / Bug Tracker / Bug assigned to

Ticket Jump

Edit permissions

Start typing to add... Browse Remove

Owner

☒ View / Run
 ☒ Edit / Delete

View effective permissions...

Apply 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:

Edit permissions

Browse
Remove

Owner

User: Testing2020 2020

☒ View / Run
☐ Edit / Delete

[View effective permissions...](#)

Apply permissions

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

InfoCapture / All Reports

Ticket
Jump

+ Add new report

Bug Tracker

Report name	Owner	Last modified	Date created	
Bug assigned to	Claromentis Administrator	05-05-2020 04:18	20-07-2015 02:40	<div>Copy</div> <div></div>

Edit / Delete permission:

Edit permissions

Browse
Remove

Owner

User: Testing2020 2020

☒ View / Run
☒ Edit / Delete

[View effective permissions...](#)

Apply permissions

InfoCapture / All Reports

Ticket
Jump

+ Add new report

Bug Tracker

Report name	Owner	Last modified	Date created	
Bug assigned to	Claromentis Administrator	05-05-2020 04:18	20-07-2015 02:40	<div></div> <div></div> <div></div>

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 Summary

✎ Edit project properties

🔑 Project permissions

📄 Statuses

Conditions

📄 Field condition sets

🔗 Triggers

Behaviour

📄 Field visibility

📄 SLA

⚙️ Automatic changes

🔗 Workflow

Notification

✉️ Notifications

✉️ Default notification fields

List options

📄 General list options

📄 Tickets list columns

🔍 Searchable fields

Project permissions

Create project roles and define their permissions within the project.

User groups, roles, and individuals can be put into project roles. Each role has its permissions within the project defined here. One role may be given rights to only submit tickets, and a higher role may be given rights to update and assign them, for example. Additionally users can be granted additional rights beyond what their project role would ordinarily allow, just for tickets they have pers submitted and those assigned to them.

👤 Project roles

🔑 Rights

⚙️ Options

🌟 All

Rights	Project role					
	<input type="checkbox"/> Admin	<input type="checkbox"/> Development	<input type="checkbox"/> Testing	<input type="checkbox"/> Users	<input type="checkbox"/> Submitter of ticket	
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Update tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Submit tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Handle tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Update tickets status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Assign tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Add notes to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Attach files to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Manage tickets (delete, files, notes)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
View reports page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
View statistics page	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Save

To begin creating reports, check our [Infocapture report building](#) guide.

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](#)