

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:

Report Title	All	Submitted by me	Open	Submitted by me	Assigned to me	Submitter
Asset Register	1	0	1			
Branch Manager Weekly Checklist	0	0	0	0		
Change of Salary or Job Title authorisation		0				
Employee Of The Month						
Event Ma	1					

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

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 Style

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 Style

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

Start typing to add... 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 Jun

Bug Tracker

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

Edit / Delete permission:

Edit permissions

Owner

User: Testing2020 2020

View / Run

Edit / Delete

[View effective permissions...](#)

InfoCapture / All Reports

Ticket | Jum

Bug Tracker

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

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 with One role may be given rights to only submit tickets, and a higher role may be given rights to update tickets. Additionally users can be granted additional rights beyond what their project role would ordinarily have. For example, a user can be granted rights to view tickets submitted and those assigned to them.

Project roles

Rights

Options

All

Rights	Project roles			
	<input type="checkbox"/> Admin	<input type="checkbox"/> Development	<input type="checkbox"/> Testing	<input type="checkbox"/> User
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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"/>
Assign tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add notes to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach files to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage tickets (delete, files, notes)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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, 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](#)

