



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:

The screenshot shows the Claromentis InfoCapture front end. The header is pink with the Claromentis logo, a search bar, and navigation links. The main content area shows a grid of report tiles with icons and filters.

Report Name	Filter	Count
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 Ma	All	
	Submitter	

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

+

 Add a new project

Import project

Edit System Style

Q

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

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

Admin / Infocapture

Projects

Rights to create public reports

General Settings

+

 Add a new project

Import project

Edit System Style

Permissions

Start typing to add...

Browse

Remove

User: Claromentis Administrator

View matching users...

Apply permissions

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...](#)

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...](#)

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

InfoCapture / All Reports			
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

[Browse](#)[Remove](#)

Owner

User: Testing2020 2020

☒ View / Run

☒ Edit / Delete

[View effective permissions...](#)

[Apply permissions](#)

InfoCapture / All Reports

[Ticket](#)

[Jump](#)

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.

Related Article

[Creating a report](#)

