Sharing a report

The following section describes how to share a report with other users in your Database.

Once you design a report you can share it with other users who have been added in your Databases. You can share a Report with users based on their assigned Role in the Database. The report will be automatically updated as data are updated.

To be able to share a report you must be the Database owner or to have been assigned the 'Share reports' permission.

When you share a report with other users, they will be able to view and export the report but they will not be able to save changes to the original report, nor rename or delete it. However, they will be able to do edits and save a copy of the report and work on the copied report instead.

Also, when a report is shared with users, users cannot share or publish that report, even if they have permission to share and publish their own reports.

To be able to view the data displayed in the report, users must have been assigned to the resources (Folders, Forms) that are used in the report.

So for example, if you design a report using Records added to "Form A" and you share the report with all users that have the Role "Data Entry" in the Database, a user that has no access to "Form A" will be able to view the report in the Report List page but the report won't include any visible data when opened.

💡 You can stop sharing a report anytime.

Database owners will be able to view all shared reports in the database in the Reports List page.

⚠️ For Databases added before August 3, 2020 the 'Share reports' permission must be manually assigned to Roles via the Roles section.

For Databases added from that date onward the following stands for each Database template:

- **Blank database template**: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission
• **Multi-partner reporting database template**: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission

• **Case management database template**: the Role of Administrator will have the 'Share reports' permission.

⚠️ The 'Share reports' permission cannot be granted on a per resource or a per user basis.

### How to share a report

• To share a report, click on "Reports" to navigate to the Report List page.

• Click on the name of the report to open it.

• Optionally, click on "Collapse" to collapse the Report Design side panel.
• Click on "Sharing & Publishing" to reveal the drop-down menu.

• In the Sharing tab check the boxes that corresponds to the Roles of the Databases with which you want to share this report.
If you use data from more than one Database and you want to share the report with the users of the additional Databases, make sure to check the boxes for the Roles in these Databases as well.

To stop sharing a report uncheck the boxes. When you uncheck the boxes the report will be removed from the Report List page of the users that was it was shared with.

- The report is now shared with the users that have been assigned the selected Roles and they will be able to view it in the Report List page.