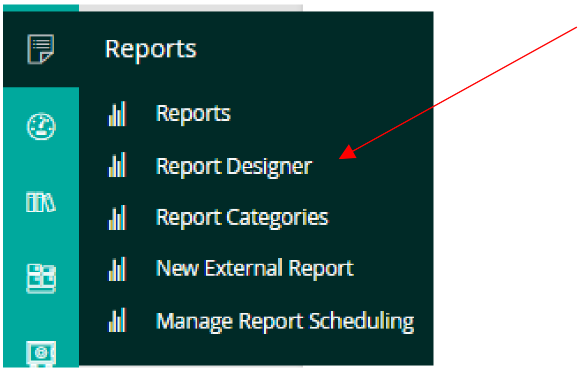
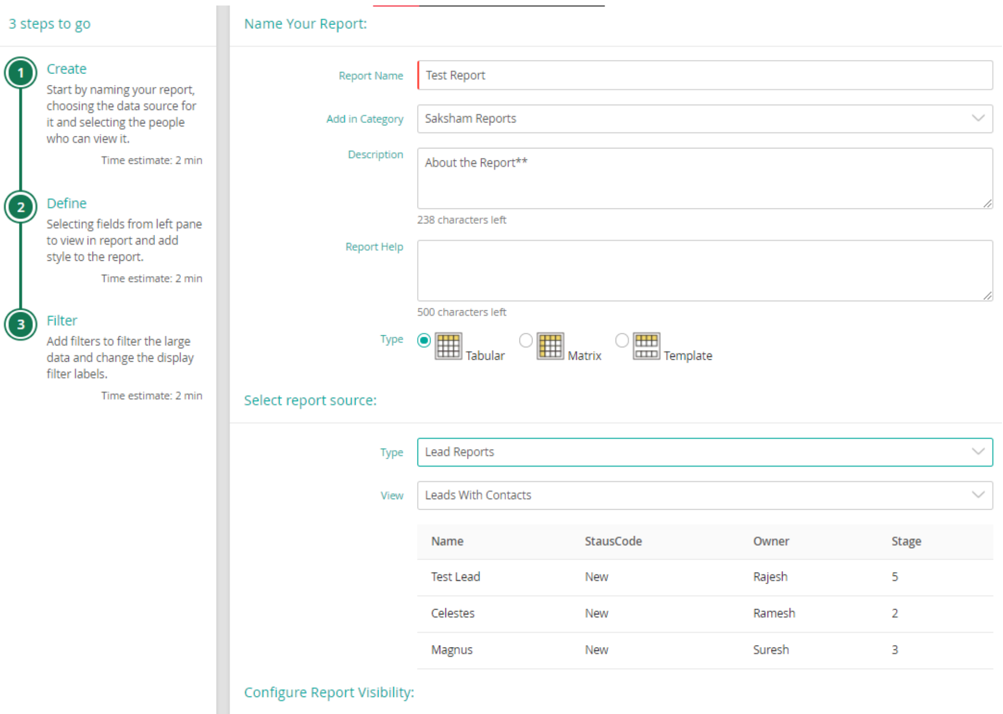
Steps To Create: Report

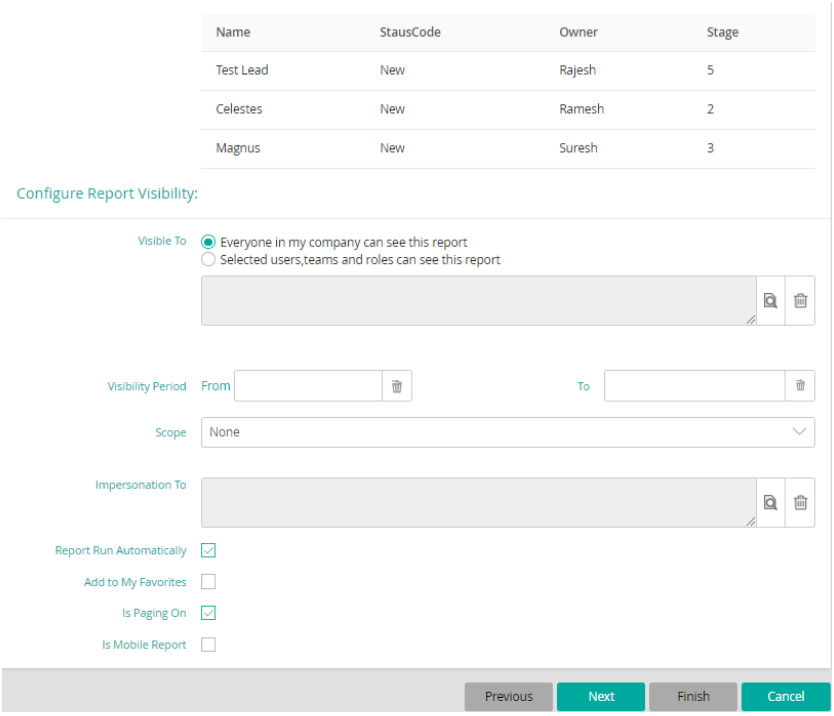
Step 1: Go to Report icon and click on Report Designer tab.



Step 2: This will redirect to the 1st page of Report designer.

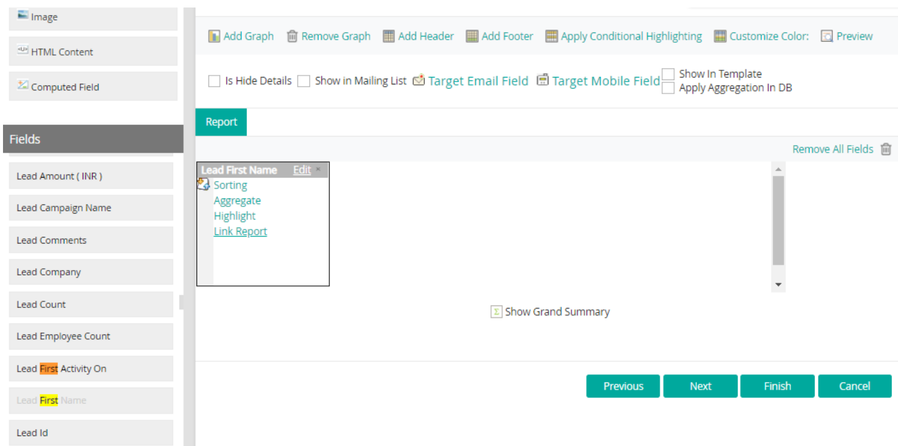


- 1st page is to Create the Report which includes naming the report, choosing the data source for it, and selecting the people who can view it, etc.
- You can name the Report in Report name section, Select the category of the report in the drop-down menu. The brief about the report in Description section. Also, select the type of report out of 3 given options.
- Now coming to the Report source, we'll select the type of report in the dropdown menu, and select the required view in the selected report type.



- Now coming to Configuration of report visibility, we have 2 options. Select the first option if one has to keep the report visible to everyone, else select the second option in which we can limit the visibility to defined set of employees.
- We may also define the visibility period, by mentioning the start date and the end date.
- Now, in scope we can select any of the given 5 options (i.e. None, All, Team, Subordinate & individual)
- You may also select if the report should execute automatically or not by checking the option, as well as may turn the paging off or on based on one's need.
- Click on mobile Report check to make it visible in mobile configuration.

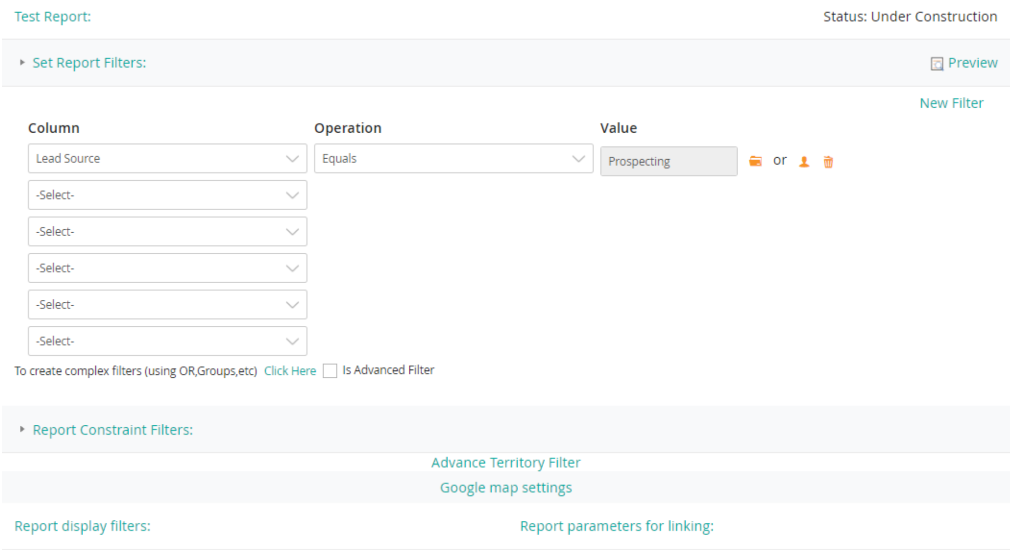
Step 3: Click on 'Next' button to define the report.



- 2nd page is to select fields from left pane to view in report and add style to the report.

- In this, we'll select the field required by (cntrl+F) and then searching for the required fields to field.
- You may also check the Grand summary to see the total records of the report.

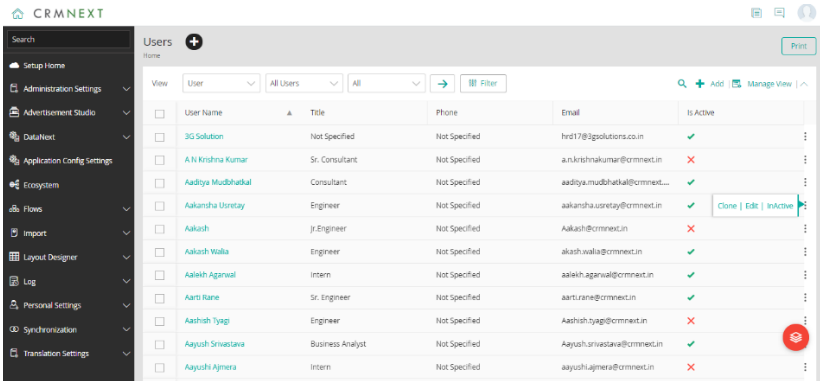
Step 4: Click on 'Next' button to define the report.



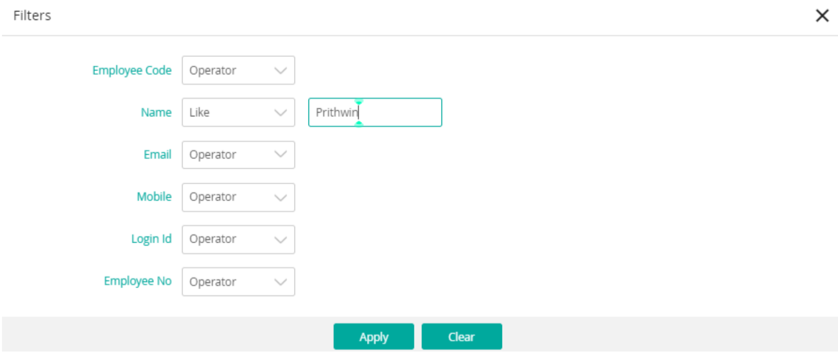
- The final page is to add filters, to filter the large data and change the display filter labels.
- Set the Filter condition to get only the filtered records in the report
- Constraint filter is used to filter records by any set of restrictions.
- Report display filter is used to add the filters which is visible in the report to filter the data based on selected filter condition type.
- Click Finish to create the Report.

Steps: Provide Roles to User

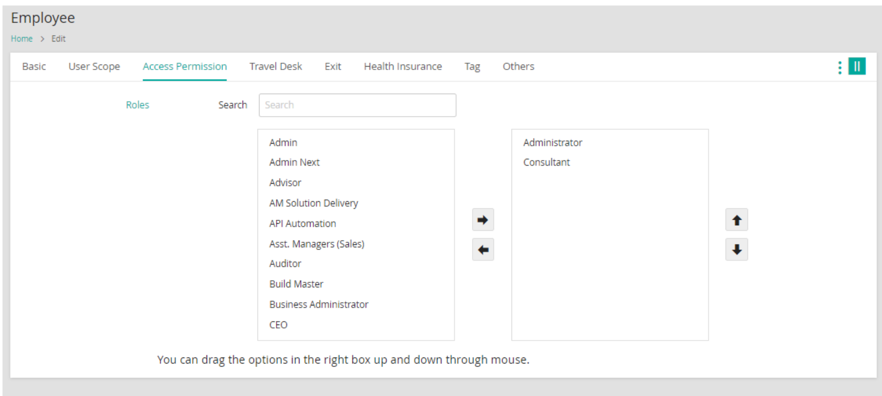
Step 1: Go to Administrative Settings and go to User management menu.



Step 2: Click on the Filter and select the name or EC, using the operator to find the required user.



Step 3: Go to Tab-3 (Access Permission)



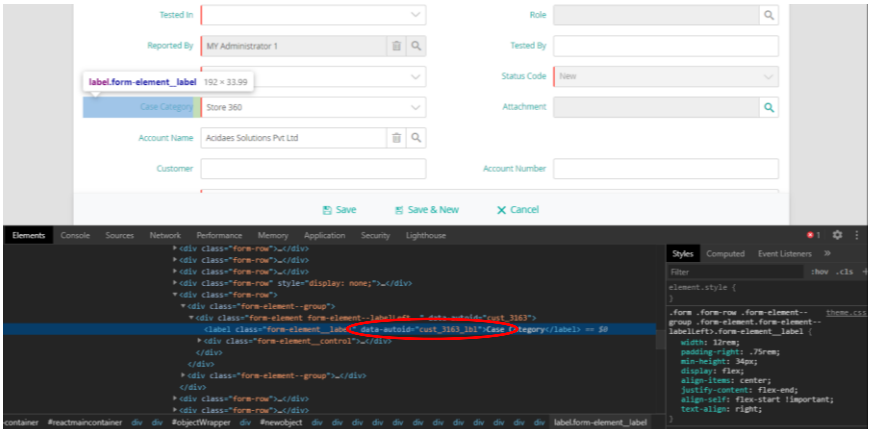
Step 4: Select the roles you want to give the user and double click the role to select it to assign the current user.

Step 5: Save the changes.

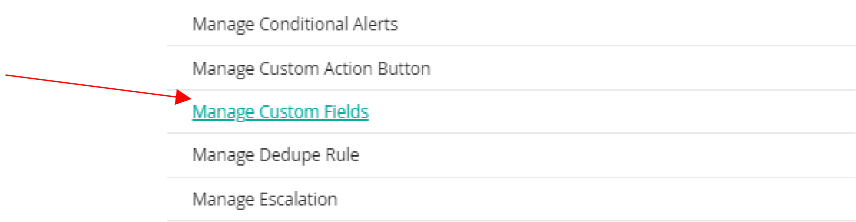
Steps: To Add a Value in a Layout

Step 1: Go to the layout page.

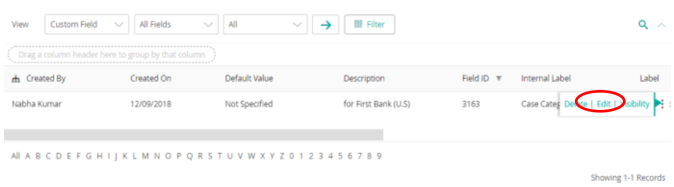
Step 2: Inspect the field in which the new value is to be added .



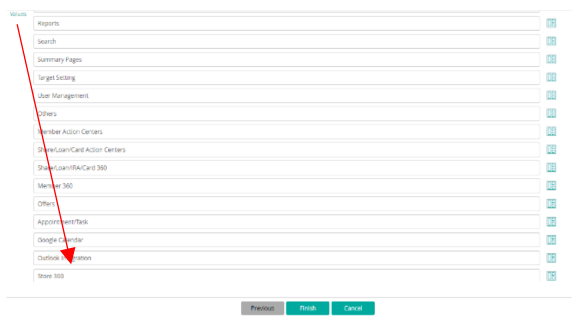
Step 3: Now copy the field id and search it in the filter in the custom field of required object.



Step 4: Now click on the edit.



Step 5: Add the required new value and save it.



Steps: To Grant Access to Views & Reports

View Access:

Step 1: Go to required object, let say Project object.

Step 2: Scroll down to views and click on manage views.

Step 3: Search for the required view, (eg. RGCU), click on 3 dots to edit the view.

Step 4: Scroll down to view visibility -> Add the user.

Step 5: Save the view.

Report Access:

Step 1: Go to required Report object.

Step 2: Search the required report.

Step 3: Click on 3 dots to edit the Report. (Let’s say RGCU report)

Step 4: Scroll down to Visible to -> Add the user .

Step 5: Save the view.