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Reporting Manager

Training Material

Document History

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Document Version	Date	Description of Changes	Changes Made By
1	1/20/15	Document Created	Michelle McCausland
2	5/05/15	Section added: Stop an Automatically Scheduled Report from Running	Michelle McCausland

Contents

- Add Manage Users
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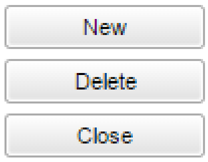
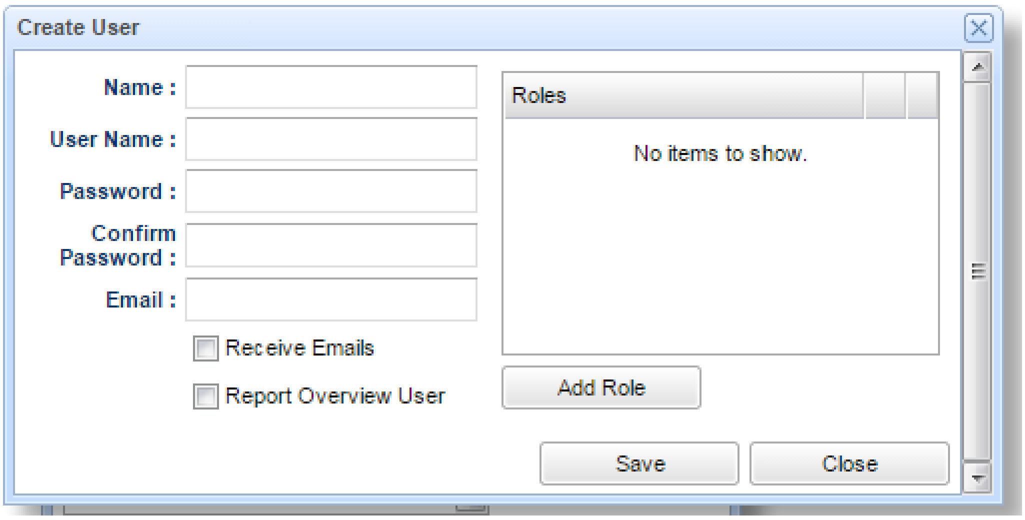
Add and manage users

To manage users, from the reporting manager homepage on the top left hand sign, click on the **Manage Users** button. (The fourth icon from the left)

You will then see the manage users pop up screen. To create a new user click the **New** button.



The create user form will then be displayed where you can enter the information accordingly.

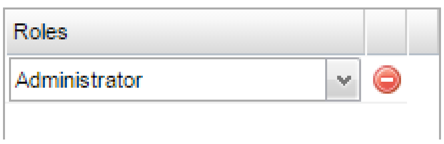


Name, Username, Password, Confirm Password, Email.

Receive Emails - Check this box to allow this user to receive emails.

Report Overview User - Check this box to give this user report overview user access.

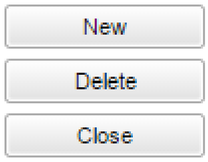
Add Role - Click this button to add roles to this user. Clicking add role will bring up a dropdown menu from where you can select the roles. To remove a role click on the red minus symbol next to it.



Once you are finished click the **Save** button to create the user.

To delete a user, from the Manage Users popup, click on the user you wish to delete and click the **Delete** button.

You can also click the **Close** button to close this window.



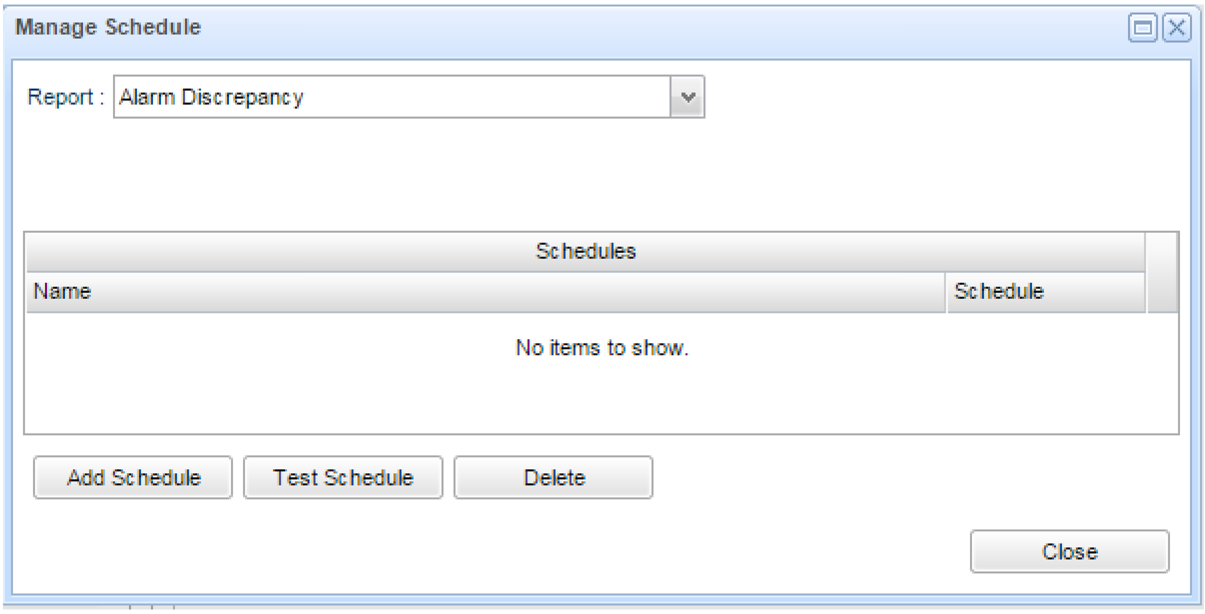
To edit an existing user, from the Manage Users popup, double click on the user you wish to edit. This will bring up their information which you can edit accordingly. Once you have made the necessary changes click the **Save** button.

You can sort the list of users from the Manage Users popup by clicking on the arrow beside the Name column header to sort alphabetically ascending or descending.

Manage Report Schedules

To manage report schedules, from the reporting manager home page in the admin controls section click on the **Manage Scheduled Reports** button (third from the left).

You will then see the Manage Schedule popup. To select a report to schedule, click on the report dropdown and select the report.



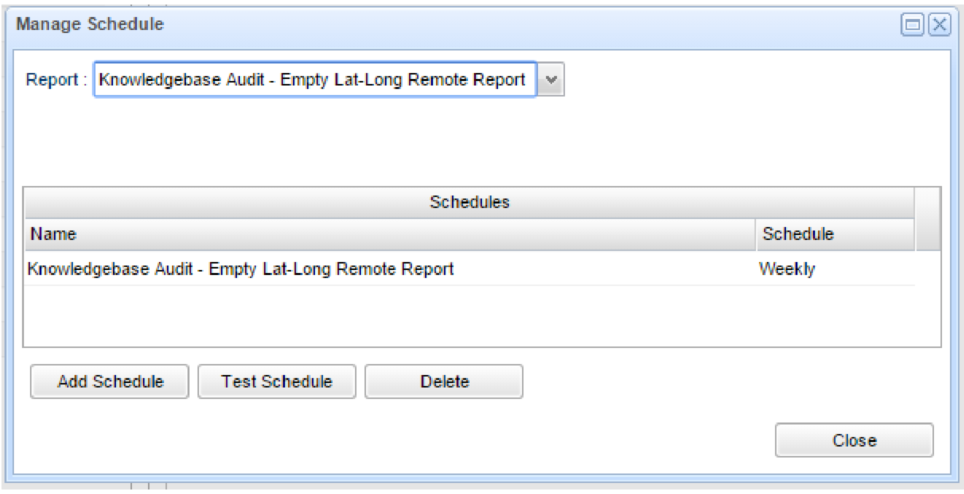
To schedule this report click the **Add Schedule** button. If you click the **Test Schedule** button you will send a test email to the support@errigal email. **Please Note:** Times are in EST.

If you wish to delete a report schedule, click on the report you require and click the **Delete** button.

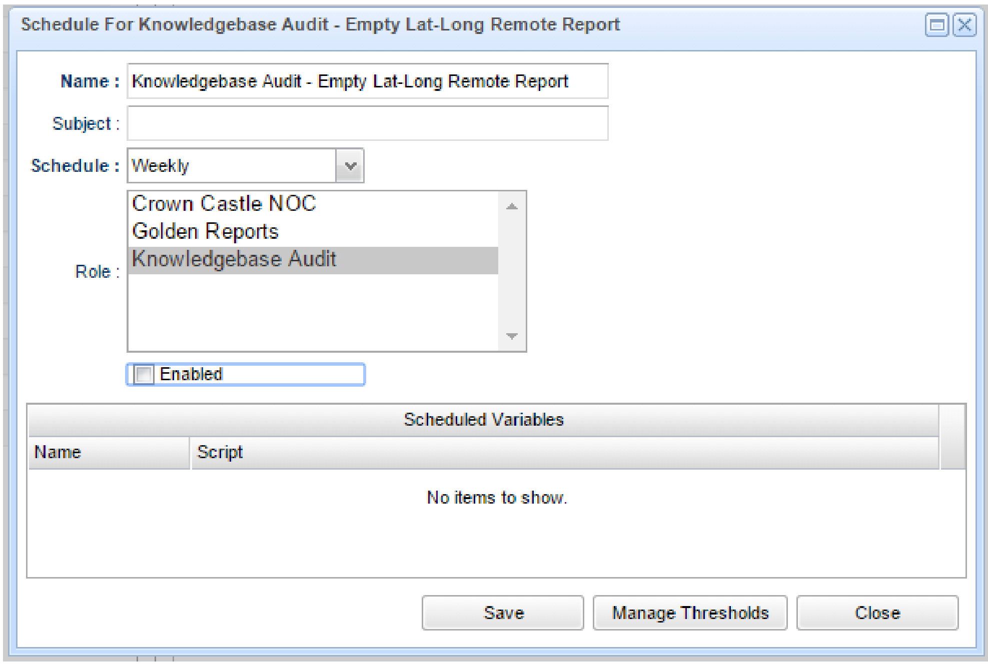
Stop an automatically scheduled report from running

In order to stop an automatically scheduled report, click on the **Manage Scheduled Reports** button (the clock icon 3rd from left).

Next, select the appropriate report from the dropdown menu to see its associated schedule.



Double click on the report's name under the **Schedules** section. **Uncheck the Enabled check box** and click the **Save** button to save the changes.

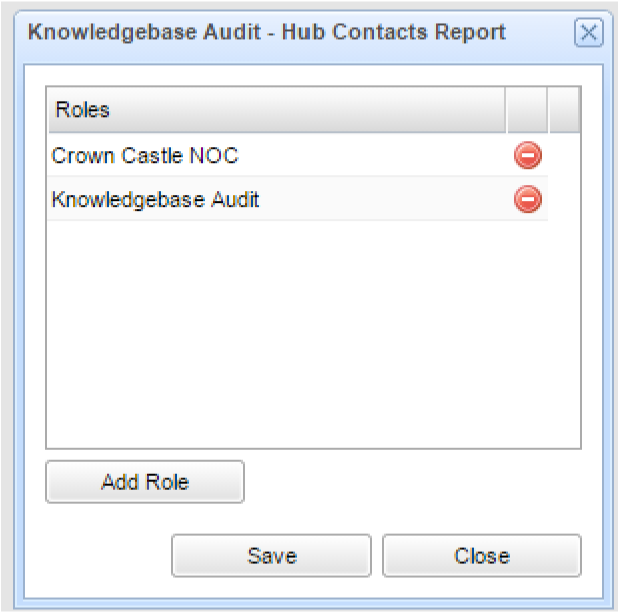


Doing this as opposed to deleting the schedule entirely allows you to easily re-enable this schedule by following the same process but checking the Enabled checkbox.

Manage Visibility

To manage the visibility to reports, click on the report that you wish to control visibility to, then from the Admin Controls area click the **Manage Report Visibility** button (last icon from the left).

You will then be presented with the visibility controls for this report.



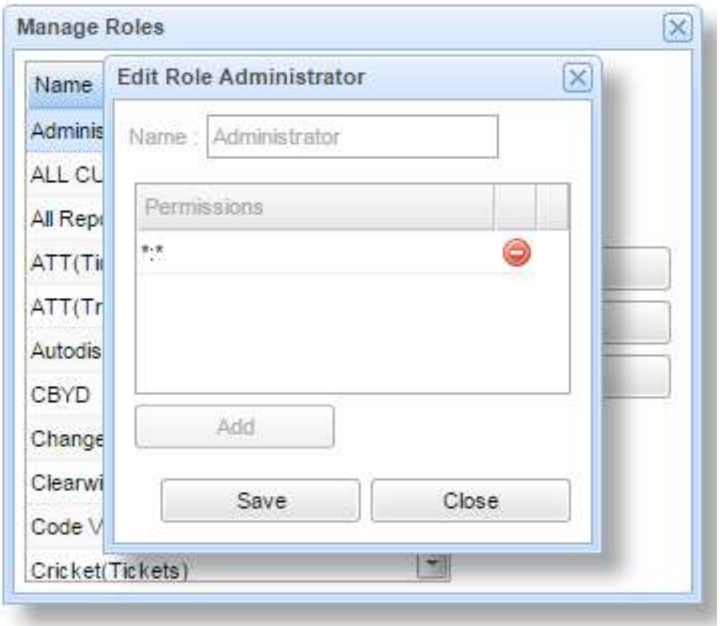
To add a role/visibility click the **Add Role** button. You can then select the role from the dropdown menu. To delete a role/visibility from the report click the minus icon next to the role you wish to delete.

Once you are finished making the changes click the **Save** button.

Manage Roles And Permissions

To manage the roles and permissions, click on the manage roles and permissions button (second from the right).

You will then see the manage rolls popup where you can double click on a user to change their roles/permissions.



To add more permissions to this user click the **Add** button and then select the desired roll from the dropdown menu. To remove a user role click the red minus icon next to the role. Once you have made the necessary changes click the **Save** button.

Comments or Questions

For any additional questions, please email support@errigal.com.