



improve it 360

an EverCommerce Solution

Emailing & Sharing

Reports and Dashboards

Agenda

Profile Settings needed to access Reports in Personal and Public Folders

Plan which Profiles should have access, before granting Report Folder access

Sharing Report and Dashboard Folders – Sharing Options

‘Running User’ of a Dashboard and when to use ‘View as Logged in User’

What if we have too many Reports and can’t find what we need?

Scheduling a Refresh and Emailing Reports & Dashboards

Profile Settings give access to Create, Manage and Export

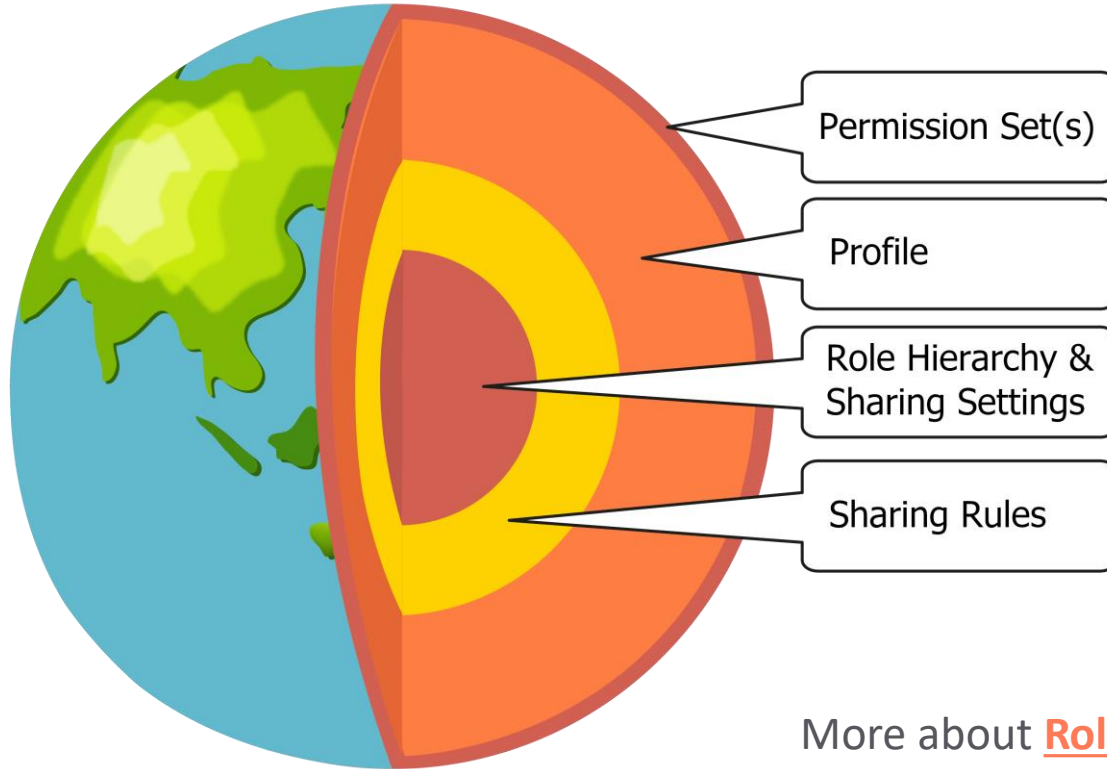
Recommended permission assignments: **All Users** **Management** **System Admins**

Create and Customize Dashboards	Create, edit, and delete dashboards in the My Personal Dashboards folder. Create dashboards and save to any shared folder if sharing rights allow.
Create and Customize Reports	Create, edit, and delete reports in the My Personal Custom Reports folder. Create reports and save to any shared folder if sharing rights allow.
Create Dashboard Folders	Create dashboard folders and manage them if sharing rights allow.
Create Report Folders	Create report folders and manage them if sharing rights allow.
Edit My Dashboards	Edit, move, save, and delete dashboards that you created in shared folders.
Edit My Reports	Edit, move, save, and delete reports that you created in shared folders.
Export Reports	Ability to Export Reports into a CSV or Excel file

Manage Dashboards in Public Folders	<p>Create, edit, and delete dashboards,1 and manage their sharing in all public dashboard folders. This permission does not extend to others' personal folders. This permission allows users to edit and share dashboards in all folders, including hidden folders. They also get these permissions:</p> <ul style="list-style-type: none"> • Create & Customize Dashboards • Create Dashboard Folders • Edit my Dashboards • View Dashboards in Public Folders <p>(To edit a dynamic dashboard, users also need Manage Dynamic Dashboards and View My Team's Dashboards permissions.)</p>
Manage Reports in Public Folders	<p>Create, edit, and delete reports, and manage their sharing in all public report folders. This permission does not extend to others' personal folders. This permission allows users to edit and share reports in all folders, including hidden folders. They also get these permissions:</p> <ul style="list-style-type: none"> • Create & Customize Reports • Create Report Folders • Edit My Reports • View Reports in Public Folders
View Dashboards in Public Folders	View dashboards in public dashboard folders. This permission does not extend to others' personal folders.
View Reports in Public Folders	View reports in public report folders. This permission does not extend to others' personal folders.

See also: [Report & Dashboard Folder Management - Profile Settings](#)

Introduction to the layers of User Permissions



Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- improveit! 360
 - [Add Role](#)
 - Management [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Sales Reps [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

More about [Role Hierarchies](#) directly from SF!

User Profiles or Permission Sets for Report settings

System Permissions

Create and Customize Dashboards
Create and Customize Reports
Edit My Reports
Edit My Dashboards

View Dashboards in Public Folders
View Reports in Public Folders
Create Dashboard Folders
Create Report Folders
Export Reports

Manage Reports in Public Folders
Manage Dashboards in Public Folders

Profile or
Permission Set

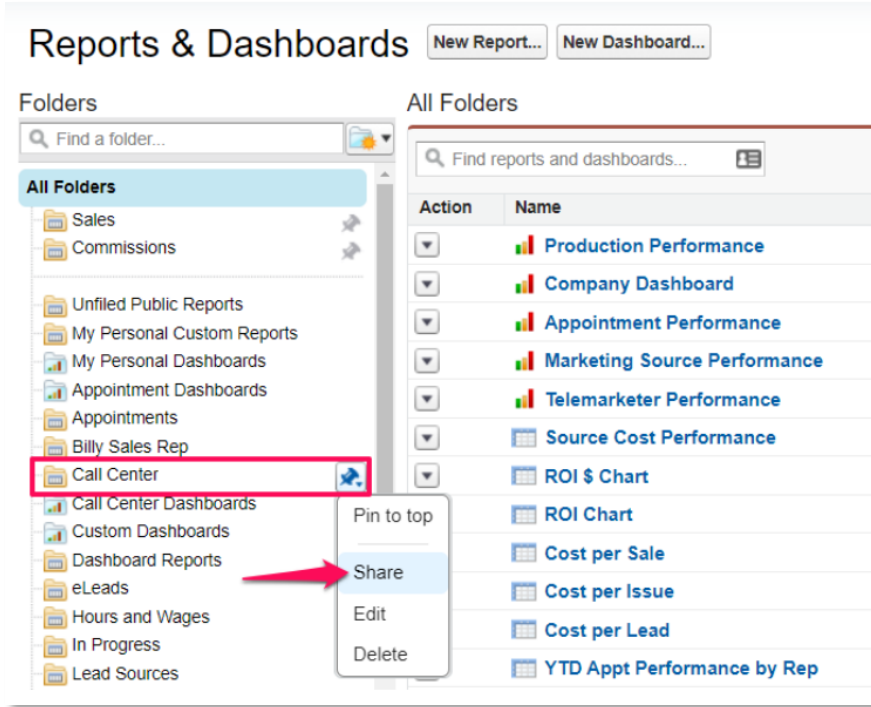
Reports Tab
Dashboards Tab

Permission Set

Permission Set

More about [Permission Sets](#) directly from SF!

Sharing Report and Dashboard Folders



Viewer access is needed to see Reports or Dashboards within a Folder OR...

To Schedule and **Email a Report** or Dashboard to the User they must have **Viewer** access to the Folder

1. Share with individual Users or Public Groups of Select Users
2. Assign one of the following access options for the folder:
 - a. Viewer: Ability to see/run Reports in Folder
 - b. Editor: Ability to add/remove reports to folder
 - c. Manager: Ability to add/remove Users & Reports, or change folder access for Users

Dashboard Considerations & Running User

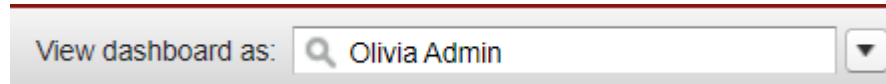
1. The Dashboard's **Running User** can cause data to appear differently in the Dashboard
2. Using a Role Hierarchy? The **Running User** for the Dashboard cannot be in a Role higher than the person you are Emailing the Dashboard to.
3. Reports displayed within a Dashboard must be visible to the Users you need access to the Dashboard; ensure they are stored in a Report folder Users have at minimum 'Viewer' access to

NOTE: When scheduling and Emailing Reports and Dashboards, you will need to Share the Report folder with the Users you would like to receive the Report or Dashboard via email. If your Dashboard contains more than one Source Report, you'll need to **share all the Folders** which contain source Reports feeding the Dashboard data.

View Dashboard As...

Run as specified user – will ensure the same data is displayed in the Dashboard regardless of who is running or refreshing the Dashboard


Run as logged-in user – allows you to automatically filter Dashboard data based on record ownership and object security settings. If Sales Reps cannot see other Rep's Appointments and Sales, using 'Run as logged-in user' will only show the Rep the Appointment and Sale data their User has access to see.



View dashboard as: ▼

Dashboard Running User

Show all users the same data in the dashboard by choosing a specific running user, or show data according to each viewer's access level by choosing to run as the logged-in user. [Learn more...](#)

- Run as specified user
- Run as logged-in user 



Report Clean-up Exercise

Find, re-organize and delete your un-used Reports

Cleaning up Reports and Report Folders is something you can start at any time. To ensure Users do not lose important reports, take the following precautions:

1. Have Users move any report they created to their own 'My Personal Custom Reports' folder
2. Create a 'Reports to Keep' folder for any report used by multiple Users
 - Create a Folder for Dashboards as well
3. Set a deadline for all Users to move their reports to one of the safe folders
4. Move all other Reports/Dashboards to a private folder inaccessible to all other Users.
 - Wait at least a week prior to deleting these reports. The purpose of this is to ensure all used reports are saved.
5. Audit and edit profile settings as necessary

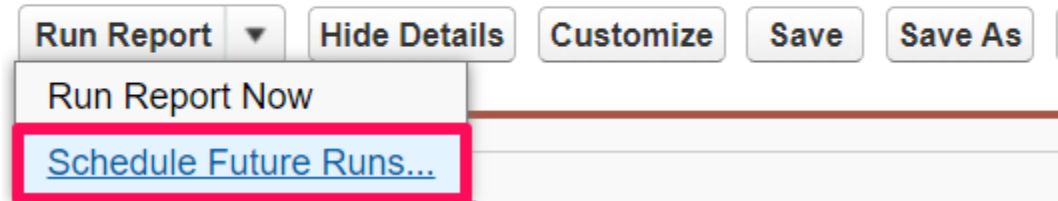
Run a Report to see [which Reports are being Run or Refreshed regularly](#)

Scheduling & Emailing Reports and Dashboards

Joined Reports cannot be Emailed

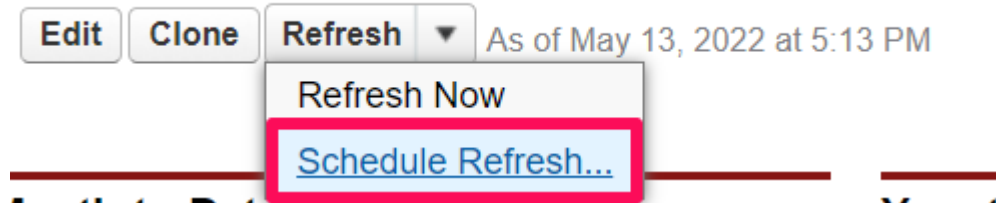
On a Report...

Click the **Arrow** next to **Run Report**



On a Dashboard...

Click the **Arrow** next to **Refresh**



Review this [Help Article](#) to learn more about adding Joined Report components to a Dashboard!

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

