

# Reports & Administrators

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This article reviews how to setup users to be able to run reports, and links to reports that are helpful for admins.

This article includes:

1. Setting Up Users to Run Reports
2. Reports for Admins

## Setting Up Users to Run Reports

Report access is managed by security permissions in Enterprise and Beyond. In order for you to grant users access to run specific reports, you will need to manage their security settings in whichever system(s) they use. Note that setting up security permissions in one system does not automatically set them up in the other system.

### Security Roles

Security Roles, or Sec Roles, manage permissions in Enterprise. For more information on sec role basics, check out [Security Roles](#).

In administration, you can navigate to each user and grant them access to a category of reports by adding the sec role named after the report group. These report groups coincide with the report categories in the reports section.

The screenshot shows the Administration interface. The top navigation bar includes 'Administration' and 'tasks appointments social email'. The left sidebar lists various categories, with 'sec roles' highlighted. The main content area shows a search bar with 'Find a service rep' and a list of 314 items available, with 'Administrator' selected. The 'sec roles' table is displayed below.

Sec Role	Description
C	Report Group - Customer
EI	Report Group - Employee Info
ER	Report Group - Employee Reporting
EX	Report Group - Exports
FI	Report Group - Financial
FC	Report Group - Forecast
F	Report Group - Funding
LI	Report Group - Log Information
O	Report Group - Order & Assignment
P	Report Group - Productivity
SI	Report Group - Sales & Invoicing
T	Report Group - Tasks
TX	Report Group - Tax Administration
TP	Report Group - Time & Pay
U	Report Group - User Security Setup

### Security Groups

Security Groups are how admins manage permissions in Beyond. For more information on security group basics, check out [Beyond - Managing Service Reps & Security Groups](#).

The Report category of the Security Groups section can be found under B > System Settings > Security Group >

## Report.

You will first want to divide your users into different report access levels whether that is by user job title, location, etc. We recommend starting by creating a group that will have the permissions to access all reports.

The screenshot shows the 'Report' configuration page. At the top, there is a blue navigation bar with icons for 'B', user, building, location, list, calendar, and a notification badge with '2'. On the right, there are buttons for 'TASKS', 'QUICK', and 'LIVE CHAT'. Below the navigation bar, the breadcrumb path is 'System Settings > Security Groups > Report'. A grey informational box states: 'Reports security groups are used to grant service representatives access to a set of reports. Note that service reps may be a member of only one of this type of security group.' Below this is a table with columns: Name (with an upward arrow), Description, Hierarchy, and an empty column with a plus sign. The table contains two rows: 'All Reports' with description 'All Reports' and hierarchy 'System'; and 'Employee Reporting' with description 'Report access for group...' and hierarchy 'System'. Each row has a vertical ellipsis menu icon in the empty column.

Once you create a report Security Group, you will be able to select which reports this group of users can run by selecting either an entire category of reports (ex. Orders & Assignments) or using the arrow to single out specific reports that group can run (ex. Under Productivity).

### Report Security Group

Name: Staffing specialist  
Hierarchy Level: System

Description: For Staffing specialists

Properties (14) Groups: 4, Individual reports: 23

Filter...

Order & Assignment v

Productivity ^

Rep Productivity Reports

Order Time To Hire Ratio Reports

Message Productivity Reports

Order Fill Ratio Reports

Members (2) +

Next, add your users to the members section to give them selected permissions.

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## Reports for Admins

The following is a list of reports we think admins might want to utilize to help manage the system.

- To help manage sec roles, run the [user security setup](#) reports to determine what function and form permissions each role grants
- To help manage what changes have been made in the system, check out the [change log reports](#).
- To manage tasks check out the [Task Register Report](#).

## Related Articles