

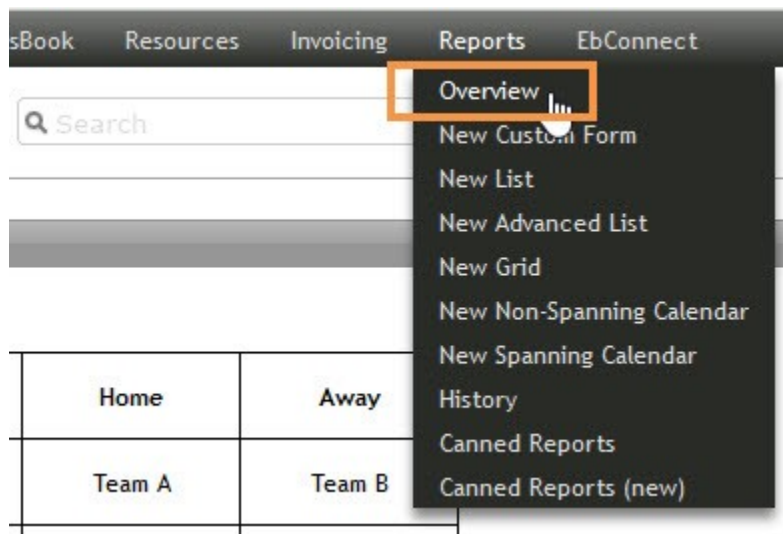
# Sharing a Report With Other Users

Updated: November 4, 2015

You are able to share a report that you have created with other users on your account. This allows them to run the report, but they are not able to edit or delete it.

To share a report which you have created with other users:

1. Hover over *Reports* and click *Overview*:



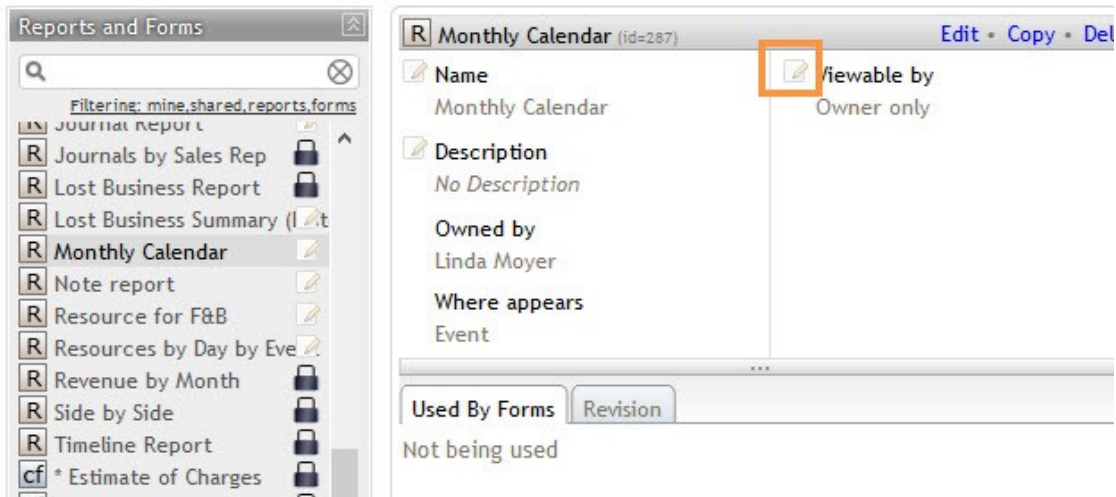
2. Find the report you would like to share in your report list, and click on the title to select it.

*If you are the owner of the report, don't click on the paper and pencil icon -- that will open the report for editing.*

The screenshot displays the eventbooking.com website interface. At the top left is the logo for eventbooking.com, and to its right is a search bar with the text "Search". Below the header, there are three main panels:

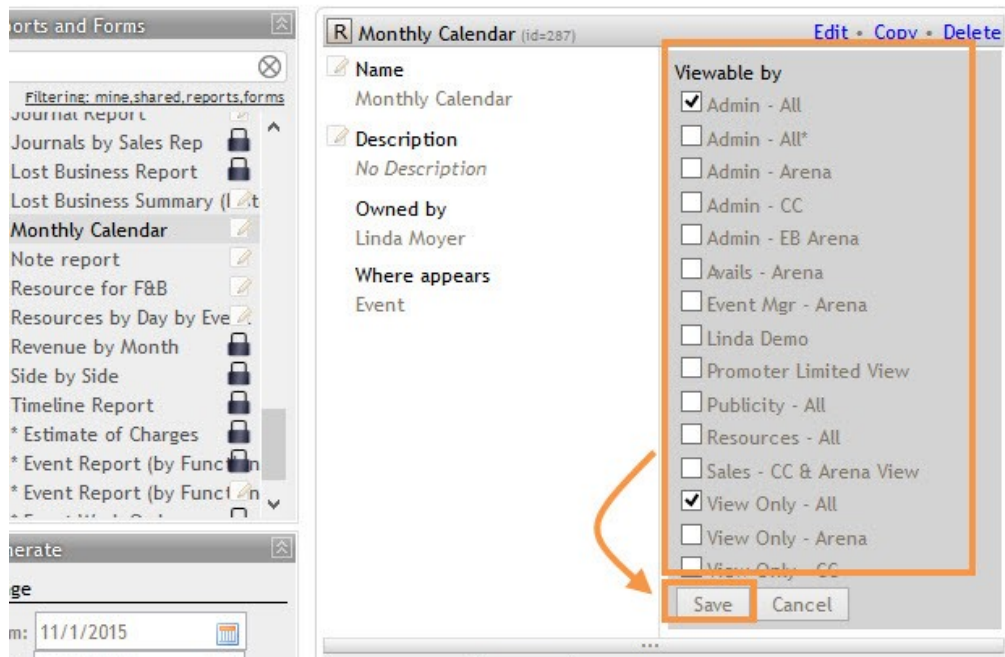
- Reports and Forms:** A list of reports with a search bar and a filter "mine\_shared\_reports\_forms". The "Monthly Calendar" report is highlighted with an orange box. Other reports include "Journal report", "Journals by Sales Rep", "Lost Business Report", "Lost Business Summary", "Note report", "Resource for F&B", "Resources by Day by Eve", "Revenue by Month", "Side by Side", "Timeline Report", and several "Event Report" items.
- Monthly Calendar (id=287) details:** A detailed view of the selected report. It shows:
  - Name:** Monthly Calendar
  - Description:** No Description
  - Owned by:** Linda Moyer
  - Where appears:** Event
  - Used By Forms:** Not being used
  - Revision:** (tab)
- Generate:** A panel for generating the report. It includes a "Range" section with "From: 11/1/2015" and "To: 11/30/2015". Below this are radio button options for output formats: HTML (selected), PDF, PDF (old), MS Word (97 to 2007), Text, and MS Word. A "Generate Monthly Calendar" button is at the bottom.

3. In the right column, click the paper/pencil icon next to *Viewable by*.



4. Depending on your account setup, a list of individual users or a list of permission roles (admin, full, view only), or both will be listed. Select the people or roles with whom you would like to share your report, and click *Save*.

*Most accounts have an "All Users" sharing profile. Select this to share your report with everyone on your account. We are also able to create custom sharing profiles to fit your venue's workflow. For example, if you have reports specific for each department, we can create a profile to allow sharing with that department with just one click.*



5. Your report has now been shared.

The screenshot displays a software interface with two main panels. The left panel, titled "Reports and Forms", contains a list of reports with a search filter "mine, shared, reports, forms" and a search icon. The "Monthly Calendar" report is highlighted. The right panel shows the details for the "Monthly Calendar" report (id=287). The "Viewable by" section is highlighted with an orange box and lists "Admin - All" and "View Only - All". Below this, the "Used By Forms" section shows "Not being used".

**Reports and Forms**

Filtering: mine, shared, reports, forms

- Journal Report
- Journals by Sales Rep
- Lost Business Report
- Lost Business Summary (List)
- Monthly Calendar**
- Note report
- Resource for F&B
- Resources by Day by Event
- Revenue by Month
- Side by Side
- Timeline Report
- Estimate of Charges
- Event Report (by Function)
- Event Report (by Function)

**Monthly Calendar (id=287)** [Edit](#) [Copy](#) [Delete](#)

- Name**  
Monthly Calendar
- Description**  
No Description
- Owned by**  
Linda Moyer
- Where appears**  
Event

**Viewable by**

- Admin - All
- View Only - All

**Used By Forms** [Revision](#)

Not being used