QUICK GUIDE

REPORTING TAGS

USE CASE:

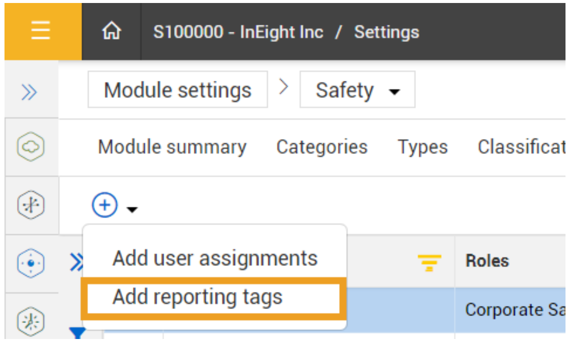
Reporting tags are used to secure information displayed in reports. If a question is assigned a reporting tag and the user running the report is not assigned that reporting tag in Compliance or Completions, the user cannot see the response to the question in a report.

ADD MODULE-SPECIFIC REPORTING TAGS

1. At the root level for either Compliance or Completions, select a module.
2. Click on the **Gear** icon to be taken to the Module Summary page.
3. Under Configurations, click on **Reporting tags**.
4. Click the **+ Add** icon to add each reporting tag.
5. When done, click **Save**.

ADJUST USER ASSIGNMENTS

1. From the same Module summary page, click on the **User assignments** tab.
2. Click the **+ Add** drop down, then select **Add reporting tags**.



3. Select one or more users by checking the box next to their name.
4. Click **Next**.
5. Select the checkbox for one or more reporting tags to assign.
6. Click **Save**.

ADD ABILITY TO SEE THE REPORTS

1. In Suite Administration > Roles and Permissions, select the checkbox of the non-Level 3 role that requires visibility to the attachment on the completed Form/Task.
2. Click the **Edit Role** icon.
3. Open the **Report** drop-down and check the **View integration reports** checkbox.
4. Click **Save**.

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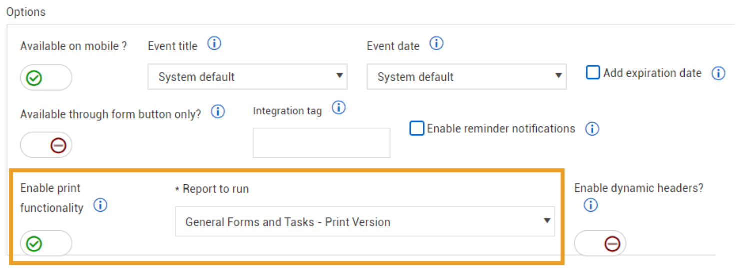
ADD TAG & REPORT PERMISSION

1. Within the module you've been working in, create a new form/task or open an existing one.
2. For any question type, where you need to limit permissions, select the **Access** drop-down.
3. Select the appropriate Reporting tag(s).
4. Under Properties, ensure the **Enable print functionality** toggle is turned on, and the report to run option is configured.



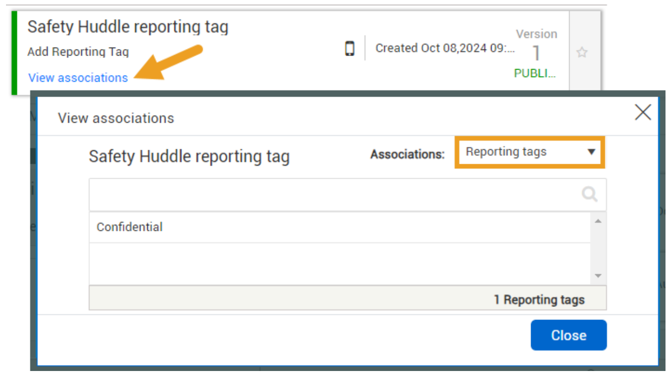
5. Click **Save** and **Publish**.

VIEW EVENT/TASK REPORT

1. From the All Events or All Tasks page, select the checkbox for the completed event/task that's been set up.
2. Click on the **Print** icon.
   - This icon is disabled if the Enable print functionality has not been set up for the form/task.
3. If your permissions allow, you will be able to view the fields where reporting tags were applied..

VIEW REPORTING TAGS IN USE

1. From the Templates Manager, click on the **View Associations** hyperlink of a specific form/task.
2. Select **Reporting tags** from the drop-down.
   - NOTE: Service Accounts that run reports will not honor the report tags.



3. When done, click **Close**.