

Create a Report Category

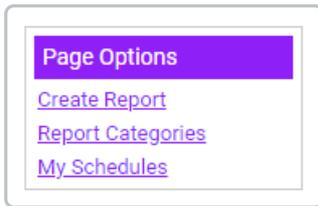
Last Modified on 26/02/2021 8:45 am GMT

Permissions

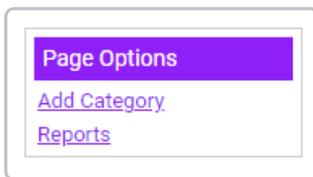
You will require an Access Role with the following permissions:

- Reports

1. Navigate from the **Homepage** to **Reports**. Within the Page Options menu, click **Report Categories**.



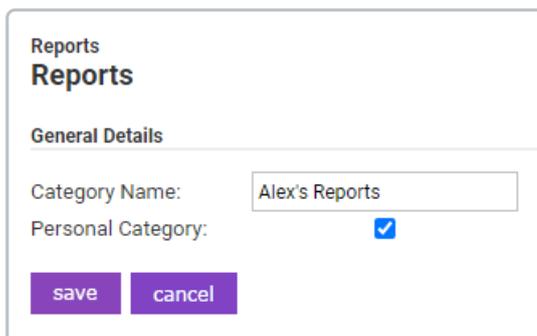
2. Click **Add Category** from the Page Options menu.



3. Enter a **Category Name**.

4. Decide whether you want to create a **Personal Category** which is only available for use by yourself or a **Report Category** which can be seen by other users.

- Click the checkbox to create a personal category.
- Leave the checkbox unticked to create an account-wide report category which can be seen by other users.

A screenshot of a form titled 'Reports' with a sub-header 'Reports'. Below the sub-header is a section titled 'General Details'. In this section, there is a label 'Category Name:' followed by a text input field containing 'Alex's Reports'. Below that is a label 'Personal Category:' followed by a checked checkbox. At the bottom of the form are two buttons: 'save' and 'cancel'.

5. Click **Save** to store the new Report Category.

6. Click **Reports** in the Page Options section to return to the Reports page or alternatively click **Close**.
