Self Serve Reports

Last Modified on 15/04/2019 2:49 pm AEST

Self serve is a feature that enables a non-administration user to create their own private reports, charts and screens.

Granting Self Serve

To grant self serve:

1. Select Application Menu. The menu appears with available applications.
2. Select **Administration**. The application displays at the landing page.
3. In the Left Navigation Area, select **Security**. The Security expands to display list.
4. Select **User Roles**. The existing User Roles display.
5. Select Self Serve role.
6. Select **ACTION**. The menu appears.
7. Select **Edit**. Form opens.
8. Select **Users** tab. The existing users with Self Serve display.
9. As required, add a new user, see User Accounts or link to an existing user account.
10. Select Link to Existing icon. The Select User Account dialogue appears.
11. Quick search for the user role you want.
12. Select **OK** to confirm.
13. Select **Save** to save the user role.

Using Self Serve

To use Self Serve:

1. Login with the self-serve user account added or linked in the steps above.
2. Select Application Menu. The menu appears with available applications.
3. Select **Home**. The Home application displays.
4. Select Configure icon to enable builder mode.
5. Select **+** in Left Navigation Area to build private reports, charts and screens.

See Report Builder , Chart Builder , Screen Builder

If the intention is to add private items to other applications rather than Home, then after the user is added to the Self Serve role, the administrator performs the steps:

- Navigate to the Application which you want self serve user to place private item in.
- Create a Personal Section.
- Grant self-serve user the navigation access to the Personal Section, see Navigation Access .

A private item is private, which means other users won't be able to see it including administrators.

Adding Personal Sections

Personal Sections are special sections that can be added anywhere to the navigation that allows users to create Self Service reports, charts and screens.

1. Select the Configure icon in the top right corner.
2. Select the **+ Page Item** icon in the Left Navigation Area. The Create New Page dialogue appears.
3. Select **New Personal Section**
4. Select **Create**.
5. In the **Name field**, type name of the personal section.
6. In the **Description** field, type the description.

You will now need to grant Navigation Access to the roles that require access to this new section.