Cvent Reporting Visibility [1]
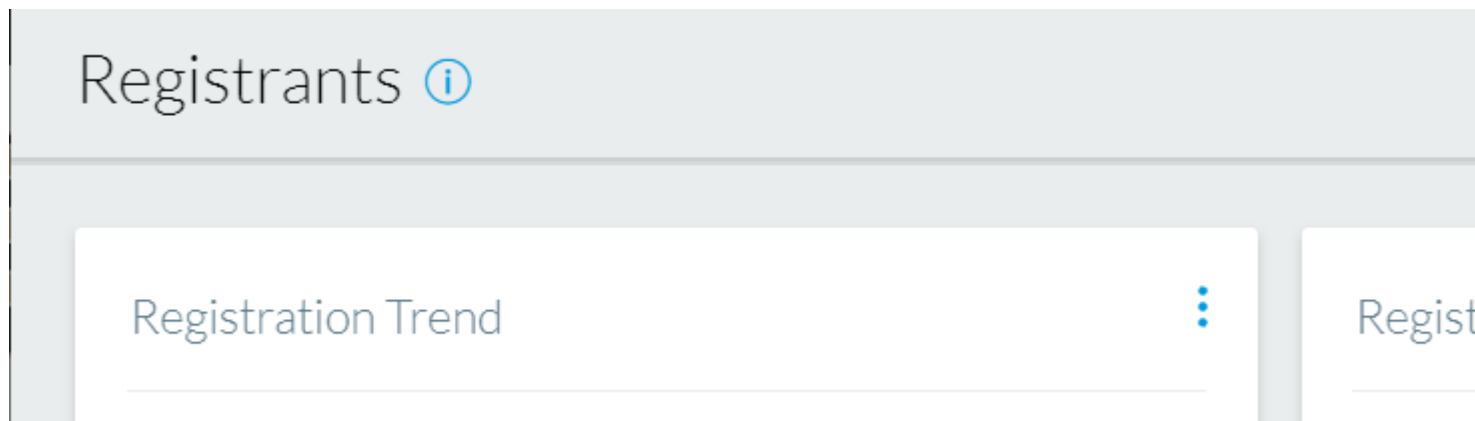
October 19, 2021 by Melanie Jones [2]

By default, any saved Cvent Report [3] is only accessible to the person who created it. Whoever created and saved the Report will need to expand the Report Visibility for anyone else to access it. This is important for two scenarios:

1. You wish to share a Report with another licensed Cvent user who you are collaborating on an event with. You'll need to not only share the event with them [4] but also share the Report Visibility (below).
2. You wish to share a Report with a free, Portal user. Your eComm specialist will need to help you complete this task [5], but first, you must share the Report Visibility with your eComm specialist(s).

Share Report Visibility While Saving

- First, **run a Report** [3]
- Hover **Actions** in the top right
- Click **Save As** in the dropdown

- **Name** the report and provide a **description**
- **Select the blue pencil** icon near **Visible to: Only me**

Registrants ⓘ

Save Report

Report Details

* Name

08 UREL Mel Testing New Experience Registrants

Description

Registrants for Event: Mel Testing New Experience

451 characters remaining

Save   **Cancel**

- In the top dropdown, choose **This report is only visible to: Selected users**
- **Check the box next to the users** you want to have access to this Report
    - **TIP!** Use the search function to easily find a user by name or email
- Select the green **Apply changes** button

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Registrants ⓘ

Save Report

Report Details > Visibility

This report i

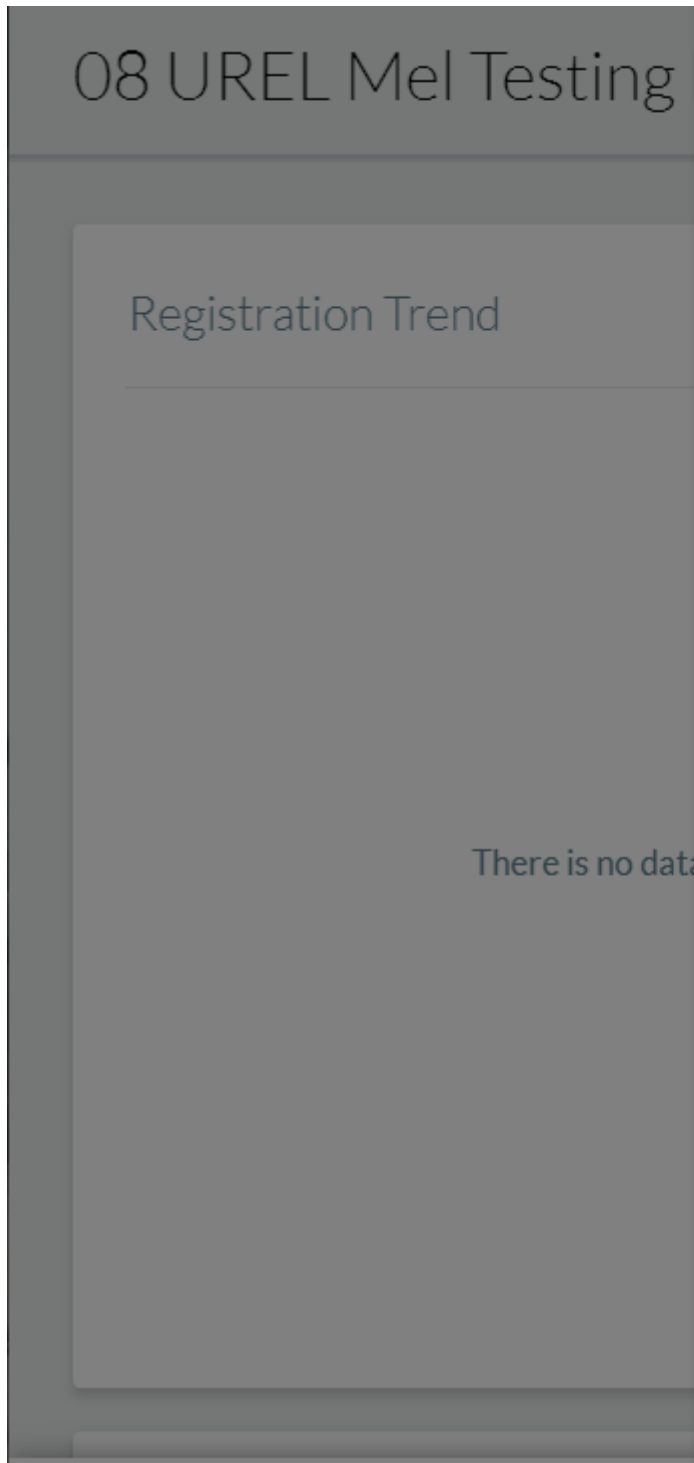## Groups (4)

CRM CoE

Standard Event User

Users (5)

	Name	
☑	Pamela	

Apply changes   **Cancel**

- Click the green **Save** button towards the bottom

Save Report

08 UREL Mel Testing

Registration Trend

There is no data

Report Details

* **Name**

08 UREL Mel Testing New Experience Registrants

Description

Registrants for Event: Mel Testing New Experience

451 characters remaining

Save   **Cancel**

Share Report Visibility for Already Saved Report

If you have already saved your Report, you can update the visibility later.

- Navigate to your event Report or Cross-Event Report
  - In this example, we opened an event, expanded the **Reports** section in the left navigation, then clicked **Reports**.
  - Next, we navigated to the **Saved Reports** tab.
- Click the **dropdown arrow** next to the Report's **Run** button
- Select **Edit Visibility** in the dropdown

- In the pop-up, **check the box** next to the users you want to have visibility
  - **TIP!** Use the search function to find users by name or email address.
- Click the green **Apply changes** button at the bottom

Planning ⌄

Website ⌄

Registration ⌄

Marketing ⌄

Email ⌄

Attendees ⌄

OnArrival ⌄

Surveys ⌄

Reports ︿

   | Reports

   Invitee Summary

   Question Summary

Integrations ⌄

08 UREL Mel Testing New E

Visibility

This report is vis

Groups (4)

CRM CoE

Standard Event User

Users (5)

	Name	⬍
☑	Pamela	
☐	Melanie	
☐	Melisha	
☐	Melissa	
☐	Pamela [	

Apply ch

Related Wikis

- 'New' Reporting & Portals vs. Legacy Reports & Parked Report Groups [6]
- Cvent Portal (make Cvent reports accessible to others for free) [5]
- How-To Manage Reports in the Portal (eComm specialists) [7]

Display Title:

Cvent Reporting Visibility
Send email when Published:
No

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Source URL:https://www.cu.edu/blog/ecomm-wiki/cvent-reporting-visibility

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