Getting Started

Sometimes a report is made by one person but should be maintained by somebody else. While sharing a report is one option, a more formal method is to pass ownership of that report to another person with the appropriate viewing and editing rights. Transferring report ownership is particularly useful when the current owner is planning on leaving their role as an administrator. If an administrator is planning on quitting, their reports can be formally passed on to the new administrator using this process.

> ⚠ You need the user ID of the report's owner before you begin. To transfer your own report to somebody else, you'll need your user ID. User IDs are available by an Admin > Users search.

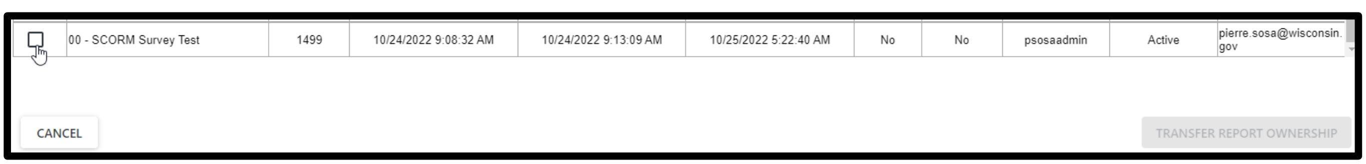
Finding the View and Manage All Reports Tool

1. From the home page, select the **Admin** option in the menu and select **Tools**.
2. Navigate through the following: **Core Functions > Core Preferences**.
3. Select the **Reporting 2.0 View and Manage All Reports** link in the System Preferences section.

List the Reports Owned by a User

The list at the bottom of the page shows all of the reports created by users in your division. To find a report, you have to filter the list using the search function. Although the text entry box is labelled **UserRef**, you need to enter the user ID. Pressing search will filter the list to show only reports owned by that user. You can only enter one user ID at a time.

1. Enter the user ID in the **UserRef** text box and select **Search.**
2. Identify the report you need to transfer by the Report Title, ReportID, or other table labels.
3. Select the checkbox in the first column. When selected, the **Transfer Report Ownership** button will activate.

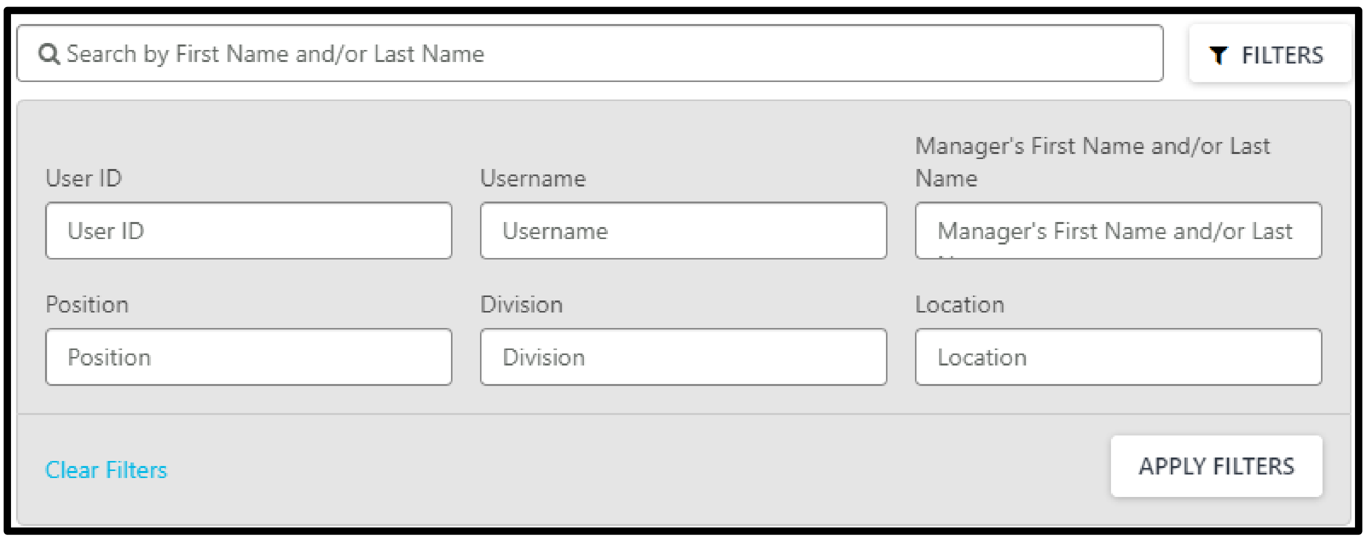


> 💡 You can select multiple reports to transfer at one time.

Transfer Report Ownership

1. Press the **Transfer Report Ownership** button.
2. A pop-up window will list the owner by ID, username, and full name, and identify the selected reports by title and reportID.

3. Select the **Select User** button to transfer report(s) ownership.
4. A left-side fly-out will allow you to search for users by user's name, user ID, username, manager's name, position, division, or by location. Enter search terms and use the filters to identify the new owner of the report.



Although this interface resembles other report sharing features, selecting multiple people is disabled and will result in a warning. Report(s) ownership can be transferred to only one user.

5. Use the checkbox beside the name of a user to select them. Note that the **Selected (Value)** tab at the top of the page has updated to "1". If you press the "selected" tab, you can see who is selected. You can return to the search function by pressing the "search" tab. Make sure that you have selected to whom report(s) ownership will be transferred.

Note the selected user's user ID. The user ID will be used to identify to whom the report will be transferred.

6. Press the **Select** button at the bottom of either tab on the fly-out. You will be returned to the Transfer Report Ownership pop-up.
7. Double-check that you are moving the correct report from the correct user to the correct new owner.

8. Press **Submit** on the Transfer Report Ownership pop-up.
9. Another pop-up will appear to confirm that "you want to go-ahead and transfer report ownership", with a note that an active report owner will be notified if you transfer one of their reports.

The auto generated email reads as follows:

From: notification@csod.com <notification@csod.com>
Subject: Reporting 2.0 - Reports ownership transfer

Dear user,

Please note that your administrator has transferred your report ownership to another user for the following report(s):

Report ID	Report Name
[value]	[title]

Please contact your administrator in case of any concerns.

This is an automated email notification. - please do not reply

10. A **Success** pop-up will alert you that the "selected report(s) are successfully transferred".
11. Press the **Close** link at the bottom of the Success pop-up.

You will be returned to the View and Manage All Reports Tool to repeat the process, or you can navigate away using the menu bar.