



Knowledge Base Article

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Article ID: 4198
Subject: Setting up Report Security in Pro Gold i2 3.xx
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Applies to: Pro Gold i2 3.xx

Purpose: Access to reports can be limited in Pro Gold i2. When a user login is set up, a user must be given access to any of the Pro Gold i2 reports that the user will be able to retrieve. If the steps below are not followed, the user will not have access to any reports. For more information on creating a user login, refer to [Knowledge Base Article 4197](#).

Procedure: Follow the steps below to grant a user access to any Pro Gold i2 3.xx reports (**Note:** The steps must be followed for each user account that needs access to Pro Gold i2 3.xx reports)

- **Super account:**
 - The **Super** login is the default master ID and the only user account that can edit/enter other user accounts
 - By default, there is no password assigned to the **Super** account
 - A password should be assigned and given only to those users who should have unrestricted access to Pro Gold i2

- **Step 1: Add Report Access to a User Account**
 - Select the **Setup Tab** and click on the **Change Company Info** icon
 - Select the **Security Tab**
 - Select the user account to edit report permissions on by using the **red arrow buttons** to scroll through the user accounts
 - Click the **Manage Reports** button
 - To give the user permission to a report, click on the **Green “+”** button next to the desired report
 - A check will appear in the checkbox next to the report to show that access has been given to the report
 - A report selection can be deleted by clicking on the **Red “x”** next to the report
 - The bottom of the screen will show specific rules for the report. Select specific options to restrict the user's access to options of the report.
 - Select as many options as desired
 - Remove selected options by clicking on the **Red “x”** next to the report rule
 - Close the **Report Manager** screen to save the report settings

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

<http://secured.progoldi2.com/webcast.aspx>

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: 4197

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