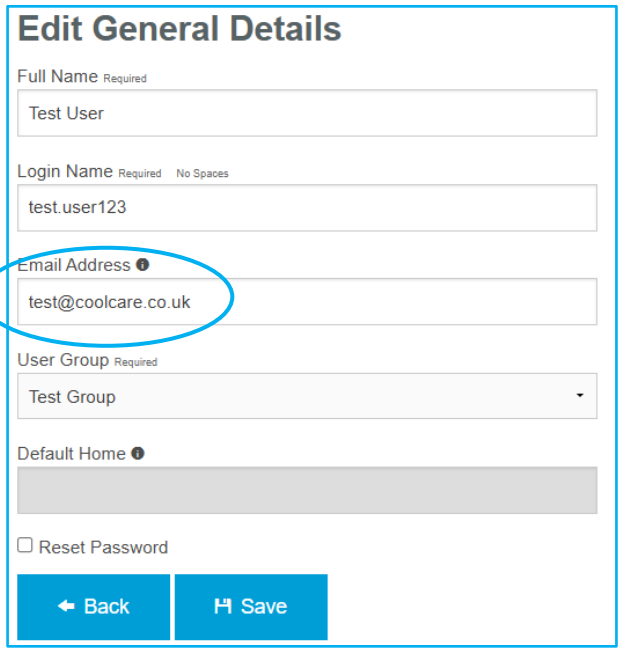
advanced reporting – access and permissions.

This guide will explain how to set up user access and permissions for CoolCare's advanced reporting section, allowing you to control what data users can access and report on through the advanced reporting page. For more information on setting up users and user groups, please see our *Users & Permissions* guide.

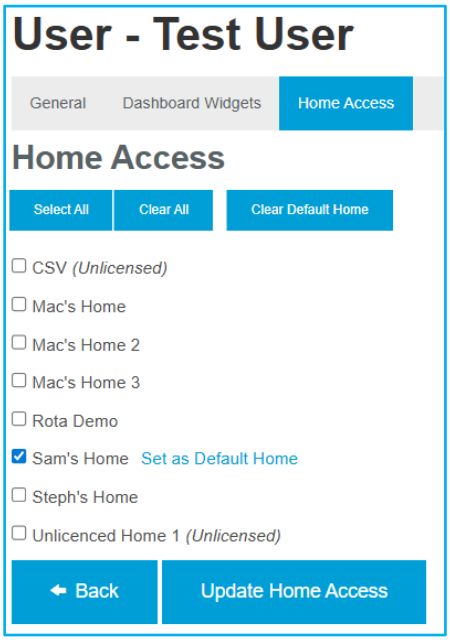
user access.

Access to the advanced reporting section is through CoolCare, so any users you have setup with access to your system will be able to access advanced reporting if they have permission to do so. The only additional thing a user needs to access advanced reporting is an email address on their CoolCare user login. This can be added via the **Manage Users** section:

- Click your name in the top-right corner of CoolCare
- Select **Manage Users** from the menu
- Select the user
- Add their email address to the **Email Address** field
- Click **Save**



Additionally, a user will only be able to report on data from homes they have access to on CoolCare. This can be amended via the **Home Access** tab on a user record.



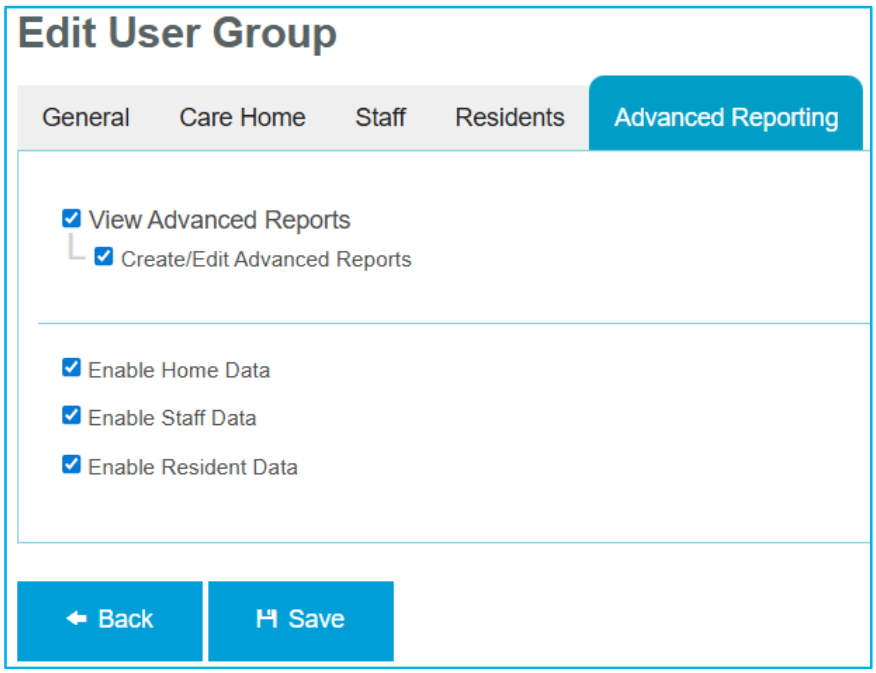
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user group permissions.

In order for users to access advanced reporting, they will also need permission to do so. This is controlled by your user groups in CoolCare, managed via the **Manage User Groups** section. Any users in the **Full Access** user group will have all the permissions enabled automatically, but any other user groups will need permissions enabling manually:

- Click your name in the top-right corner of CoolCare
- Select **Manage User Groups** from the menu
- Select the user group
- On the general tab, select **Enable Advanced Reporting Section**
- Select the **Advanced Reporting** tab that appears
- Enable additional permissions as required:
    - **View Advanced Reports –** This is required to access the advanced reporting page
        - **Create/Edit Advanced Reports** – Allows users to create reports
    - **Enable Home Data** – Allows users to report on data in the **Care Home** section of CoolCare
    - **Enable Staff Data** - Allows users to report on data in the **Staff** section of CoolCare
    - **Enable Resident Data** - Allows users to report on data in the **Residents** section of CoolCare
- Once all relevant permissions are enabled, click **Save**



Please Note: The data that a user can report on in advanced reporting is the same as the data they can access in CoolCare normally, controlled by their permissions in the other sections of their user group. Some reports and dashboards may be unavailable if the user does not have the right permissions to see all data within CoolCare.

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