

## Reassign or Copy Custom Reports

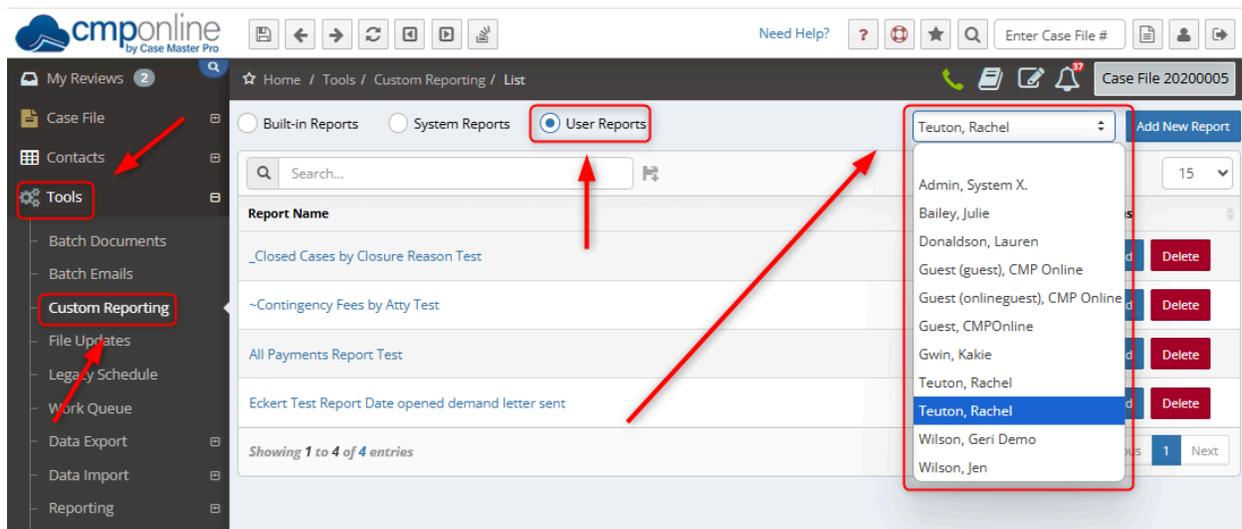
### Overview

This guide explains how to duplicate a custom report created by another user in CMPOnline and save it under your own user account or as a system-wide report. This allows you to reuse or modify existing reports without starting from scratch.

**Important: You must be an administrator to access, modify, or reassign other users' custom reports. Non-administrators can only access and modify their own reports.**

### Access User Reports

- Navigate to **Tools > Custom Reporting**.
- Click User Reports.
- From the drop-down menu on the right, select the user who owns the report you wish to duplicate.
- Click the Build button next to the desired report.

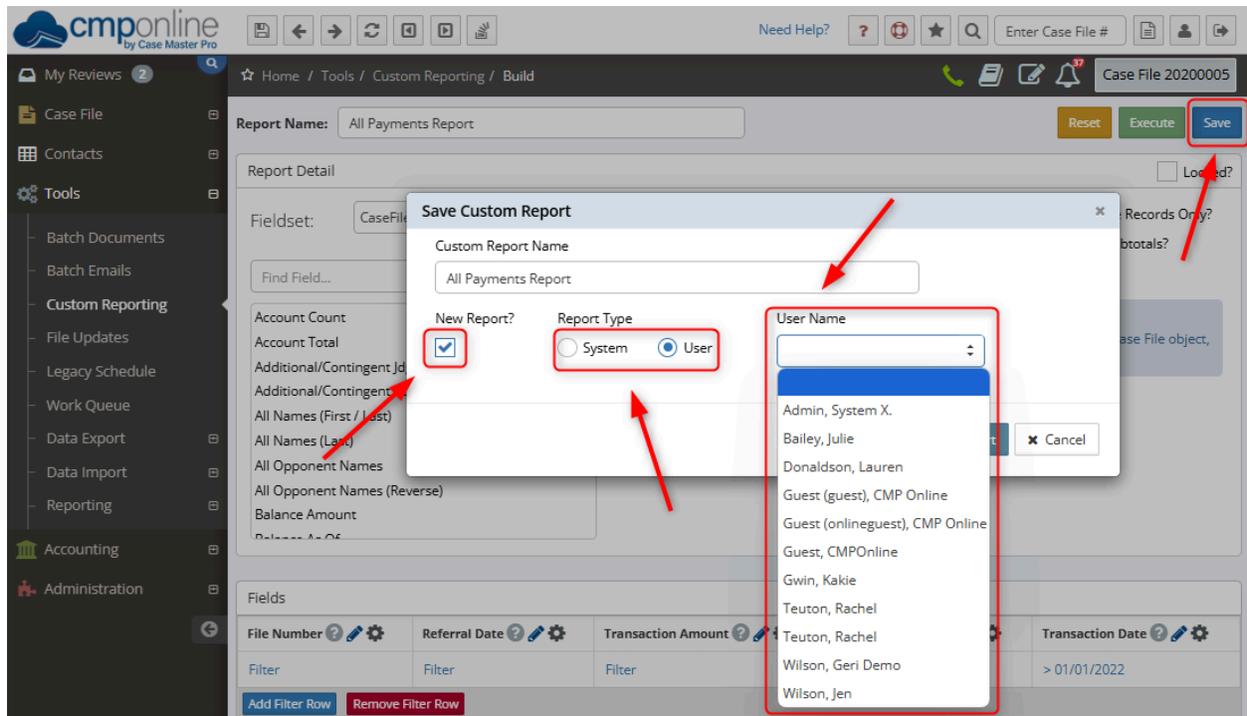


The screenshot shows the CMPOnline interface. On the left, the 'Tools' menu is expanded, and 'Custom Reporting' is selected. In the main area, the 'User Reports' radio button is selected. A dropdown menu is open, showing a list of users including 'Teuton, Rachel'.

### Duplicating User Report

- Navigate to **Tools > Custom Reporting** and select **Build** (if not already there).
- Click Save.
- Check the New Report? box.
- Under Report Type, select User.
- From the drop-down menu, select your user name.
- Click Save Report, then click OK.

## Reassign or Copy Custom Reports



**NOTE:** Alternatively, you can save a report as a System Report to make it available to all users. If saving as a System Report, you may not want to check the "New Report?" box, as this will create a duplicate.

### Accessing Duplicated Custom Report

- Navigate back to **Custom Reporting > User Reports**.
- Select your user name from the drop-down menu.
- You can now Execute, Build, or Delete the duplicated custom report.

### Questions?

<https://casemasterpro.com/software-support/support@casemasterpro.com> | (386) 675-0177