Views and Permissions

Access to views is controlled by a user's teams and group permissions. Admin users can decide which groups can create and edit views, which groups can publish views to other users, and who can use views with Quick Edit.

Setting View Permissions

The following tips enable you to set view permissions for groups.

To allow a group to edit and create views...

Note: A user must have the appropriate group permission to create their own views in order to edit their Personal view.

1. Navigate to **Setup > Access > Manage Groups** and edit a group.
2. In the Groups wizard, click Next to access the Tables tab.
3. Edit the table for which the group will have permission to create and manage views.
4. In the Table Permissions wizard, navigate to the Menu Permissions tab.
5. Select an option under Allow creating/editing/deleting Views?:
   - **Don't allow**: Users can still access views that are visible to them, but they can't make any changes.
   - **Allow for their own views**: Grant permission to create and edit their own views only.
   - **Allow for views accessible to them**: Grant permission to create, edit, and delete all views they have access to. When a new view is created, you can use the Apply tab to make it accessible to selected groups.
   - **Allow for all views**: Grant permission to edit all views.

To allow a group to publish views to other users....

On the Menu Permissions tab of the Table Permissions wizard, select the "Allow publishing Views" checkbox. This permission enables the options on the Apply tab when working in the View wizard.

Applying Views to Teams

Users with the permission to publish views can assign them to users in other teams and set a view as the default for other users.

To make a view visible to users...

1. In the table view, select **Views > Manage...**.
2. Edit the relevant view.
3. On the Apply tab, under "Make this view visible to," select Change Settings.
4. Select the appropriate user teams. Optionally choose to include subteams and new teams created in the future.
5. Click Finish.

To set the default view for user teams...

Be aware that when a default view is assigned to selected teams, it overrides the Personal view which is otherwise the user's default.

1. Edit the view that should be applied to user teams.
2. From the Apply tab of the View wizard, locate the option "Make this a default view for:" and multi-select the appropriate user teams.
3. Optionally include subteams and new teams created in the future.
4. Click Finish.

To see a list of views and teams with access...

1. From the table view, select **Views > Manage**...
2. In the list of views, the Teams with Access column shows which teams are allowed to use each view.
3. The Default for Teams column shows which teams use this view as their default.

Group Permissions to Enable Quick Edit

Views that contain editable fields require special permissions to enable Quick Edit. There are two settings in the Groups wizard that enable users to create Quick Edit views and edit records in Quick Edit from within a Table View. To begin, navigate to **Setup > Access > Manage Groups** and edit the relevant group. In the Groups wizard:

1. Edit each table where users will use Quick Edit.

2. **Menu Permissions tab:** Optionally, you can grant users the ability to create Quick Edit views. Select the checkbox "Allow members of this group to add editable fields to views they create or edit (Quick Edit)." Only the admin group has this permission by default. If a group does not have this permission, they can still use Quick Edit views but not create them. Click Next. Note that users cannot have permission to create editable views without being able to use them.
3. **Record Permissions tab:** To allow groups to open records with Quick Edit views, select the checkbox "Quick Edit records from the Table View."

selecting the Quick Edit option

4. Click **Finish**. Edit additional tables and groups as needed.