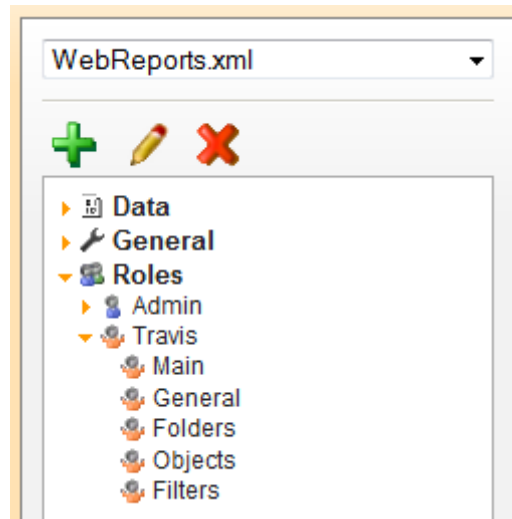





Roles

This section explains how to use the Roles to control access to Data and override the General settings.



- To add a new role select 'Roles' in the Main Menu then click the Add button ().
- To edit a role either double click it or select it and click the edit button ().
- To delete a role select it and click the delete button ().

About Roles

Roles are created to specify how a user or group of users interfaces with Exago. Roles can restrict access to folders or Data Objects. Roles can also override the general settings.

Note:

Exago was designed to be an integrated reporting solution for other applications using the application's own security and authentication methods. Although you can create Roles through the Administration Console, Roles are typically created through the API to dynamically set the users access. For more information see chapters **Integration** and **API**.

Roles have five sections to control access: Main, General, Folders, Objects, & Filters.

Main – controls the broad properties of the Role.


General – overrides General Settings.

Folders – controls which report folders a role can see and edit.

Objects – controls which Data Objects a role can access.

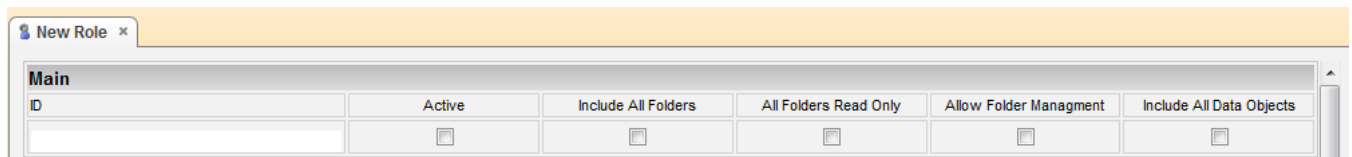
Filters – provides row level filters on Data Objects.

Creating Roles

To create a Role click 'Roles in the Main Menu and click the Add button (). This will open the Main Section.

Main Settings

The main settings control the broad properties of the Role.



ID	Active	Include All Folders	All Folders Read Only	Allow Folder Management	Include All Data Objects
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Main settings control:

Id – A name for the role.

Active – Check to activate the role.

Include All Folders – If checked all folders that are not listed in Folder Access will be available. If unchecked only those listed in Folder Access will be available.

All Folders Read Only – If checked all folders that are not specified in Folder Access will be execute-only. If unchecked only those specified in Folder Access will be execute-only.

Allow Folder Management – Displays/Hides the Folder Management Icon and functionality.

Include All Data Objects – If checked all Data Objects that are not listed in Objects Access will be available. If unchecked only those listed in Objects Access will be available.

General Settings

The General Settings of a Role override the Global General Settings. Utilize the API in order to overwrite additional settings for a user or group of users. For more information see [API](#).

General	
Report Path	C:\Reports <input checked="" type="checkbox"/>
Date Format	
Time Format	
DateTime Format	
Numeric Separator Symbol	.
Numeric Currency Symbol	€
Numeric Decimal Symbol	,
Show HTML Export Grid Lines	False
Show Crosstab Reports	False
Show Express Reports	True
Show Styling Toolbar	
Show Themes	
Show Grouping	
Show Formula Button	
Show Standard Reports	
Database Timeout	0
Read Database for Filter Values	
Show Report Scheduling Option	
Show Email Report Options	
Show Schedule Reports Manager	
Scheduler Manager User View Level	

The following settings can be overwritten:

- **Report Path** – The parent folder for all reports. The Report Path can be:
 - **Virtual Path**
 - **Absolute Path** – used to provide increased security (ex. C:\Reports)
 - **Web Service URL or .NET Assembly** – using a Web Service or .NET Assembly allows reports and folders to be managed in a database. For more information see **Report Folder Storage & Management**. A Web Service should be formatted as `url=http://WebServiceUrl.aspx`. A .NET Assembly should be formatted as `assembly = AssemblyFullPath.dll;class-Namespace.ClassName`.
- **Date Format** – The format of date values. Can be any .NET standard (ex. MM/dd/yyyy). Leave blank to use the browser culture.
- **Time Format** – The format of time values. Can be any .NET standard (ex. h:mm:ss tt). Leave blank to use the browser culture.
- **Date Time Format** – The format of date-time values. May be any .NET standard (ex. M/d/yy h:mm tt). Leave blank to use the browser culture.

Note: For more details on .NET Date, Time and DateTime Format Strings please visit <http://msdn.microsoft.com/en-us/library/8kb3ddd4%28v=vs.71%29.aspx>.

- **Numeric Separator Symbol** – Symbol used to separate 3 digit groups (ex. thousandths) in numeric values. The default is `,'`.
- **Numeric Currency Symbol** – Symbol prepended to numeric values to represent currency. The default is `'\$'`.
- **Numeric Decimal Symbol** – Symbol used for numeric decimal values. The default is `'\.'`.
- **Server Time Zone Offset** – Value that is used to convert server to client time (the negation is used to convert client to server time). Leave blank to use server time, or to use **External Interface** to calculate value.
- **Show HTML Export Grid Lines** – Sets the default value for the HTML output option Show Grid. This can be modified in the Options Menu of the Report Designer.
- **Show Crosstab Reports** – Displays/Hides the Crosstab Report Wizard and Insert Crosstab button in the Report Designer.
- **Show Express Reports** – Displays/Hides the Express Report Wizard.
- **Show Styling Toolbar** – Displays/Hides the styling tools in the Layout tab of the Express Report Wizard.
- **Show Themes** – Displays/Hides the Theme dropdown in the Layout tab of the Express Report Wizard.
- **Show Grouping** – Displays/Hides the grouping tools in the Layout tab of the Express Report Wizard.
- **Show Formula Button** – Displays/Hides the Formula Editor button in the Layout tab of the Express Report Wizard.
- **Show Standard Reports** – Displays/Hides the Standard Report Wizard and Report Designer.

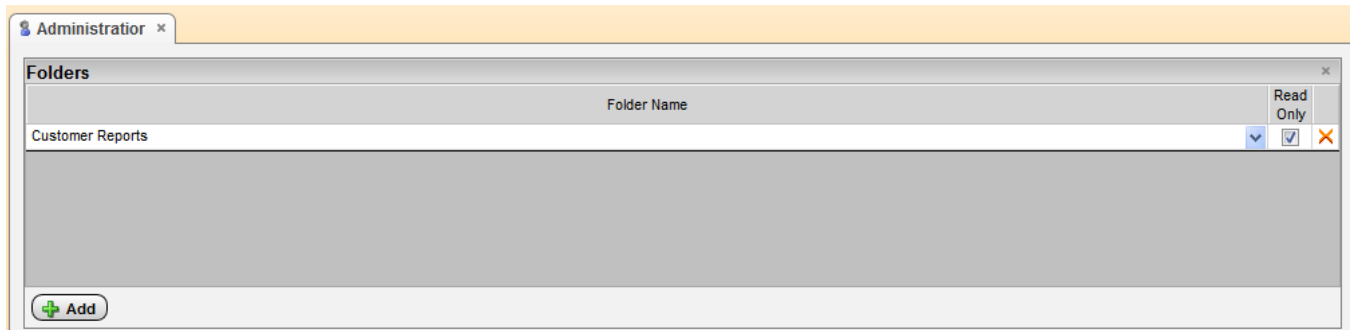
Note: If 'Show Standard Reports' is False then attempts to edit Standard or Crosstab reports will cause an 'access denied' message. Additionally if False, users will not be able to create Crosstab reports.

- **Database Timeout** – Maximum number of seconds for a single query to run.
- **Read Database for Filter Values** – Enable/Disables filter dropdowns to contain values from the database. Set to false only if retrieving values for the dropdown will take more than a couple of seconds.
- **Show Report Scheduling Option** – Displays/Hides the scheduler icon on the Main Menu. Set to False to disable users from creating scheduled reports.
- **Show Email Report Options** – Displays/Hides the email report icon on the Main Menu. Set to False to disable users from emailing reports.
- **Show Schedule Manager** – Displays/Hides the scheduler manager icon on the Main Menu. Set to False to disable users from editing existing schedules.

- **Scheduler Manager User View Level** – Controls what information each user can see in the Schedule Manager. These levels utilize the Parameters companyId and userId. There are three possible values:
 - **Current User:** Can only view and delete report jobs that have been created by that user.
 - **All Users in Current Company:** User can only view and delete report schedules for their company.
 - **All Users in All Companies:** User can view and delete report schedules for all companies (administrator).

Folder Access

The Folder Access controls which report folders are visible and executable for the Role.



Note

If **Include All Folders** is checked this list will deny access to the folders added, if unchecked the list will allow access to the folders added.

If **All Folders Read Only** is checked this list will overwrite the setting when a folder is added without the Read Only option checked.

To add a folder click New ()

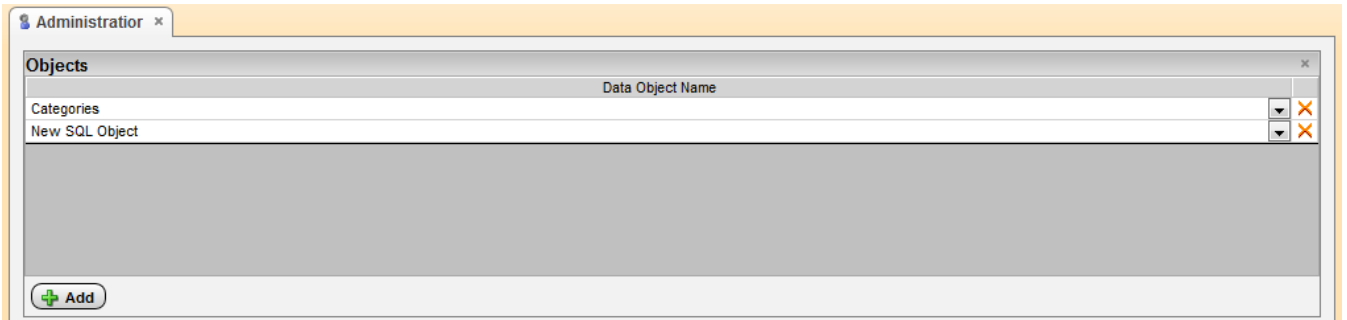
Click in the Folder Name column and select the Folder you want to add.

To make the folder execute only check the box in the Read Only column.

To delete a folder click the delete button ()

Object Access

The Objects Access controls which Data Objects are accessible to the Role. A report can only be executed if the Role has access to all the Data Objects on the report.



Note

If **Include All Data Objects** is checked this list will deny access to the Data Objects added, if unchecked the list will allow access to the Data Objects added.

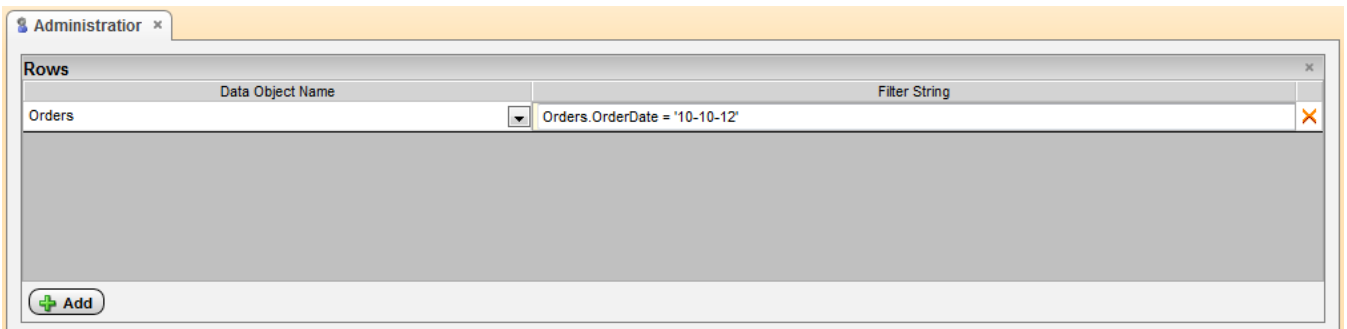
To add a Data Object click New ()

Click in the Data Object Name column and select the Object you want to add.

To delete an Object click the delete button ()

Row Level Access

The Row Level Access provides a means to filter a Data Object by Role.



To add a Data Object click New ()

Click in the Data Object Name column and select the Object you want to add.

Enter the filter string in the Filter String Column. The filter string should be Standard SQL. This string will be added to the Where clause.

To delete a Data Object click the delete button ()