

XLReporter Project File Security

Overview

There are many security features available in XLReporter to help protect the contents of a project. One such feature is security at a file system level. It is recommended that XLReporter applications are closed before changes are made. Restart any application if a change is applied while application is running.

Restrict Permissions

To set the minimum user permissions for the project, in Windows File Explorer, right-click on the project folder, select **Properties** and then **Security**. Choose the user group to edit and set the following permissions.

- Modify
- Read & execute
- List folder contents
- Read
- Write

In some cases, both the **Users** and **Authenticated Users** are set to restrict and add permissions.

Scheduler

Identify the specific user account (*User\John*) that the **Scheduler** uses during execution.

- Desktop
The user is the currently logged on user in Windows
- Windows Service
If the service is running under *LocalSystem* then the *SYSTEM* user account is used, otherwise it is the specified user.

For the user account, set the *Modify* and *Write* permissions to the following:

Folders: Workbook Reports folder as defined in the Project Explorer

Files: <Project folder>\Input\XLRdatabase.xdb

Scheduled Reports

For access to the **Viewer** applications, the user account must have *Modify* and *Write* permissions for the following:

Folders: <Project folder>\Data

On-Demand Reports

To use **On Demand Reports**, the user account must have *Modify* and *Write* permissions for the following:

Folders: <Project folder>\Data
_temp subfolder of the Workbook Reports folder as defined in the Project Explorer

Files: <Project folder>\Input\XLRdatabase.xdb

Electronic Signatures

For electronic signatures functionality, the user account must have *Modify* and *Write* permissions to the following:

Folders: <Project folder>\Data
Audit Trail connector as defined in the Connector.
PDF Reports folder of the project as defined in the Project Explorer

Team Clients

For a Team installation, the *XLRwebpool* user must be given *Modify* and *Write* permissions to the Project folder. To specify this user, enter:

- *IIS AppPool\XLRWebPool*

Click **Check Names** to ensure it is correct.

If you have set the **Workbook Reports** folder for the project outside of the project folder, you must give the *XLRwebpool* user *Modify* and *Write* permissions to the _temp subfolder of the reports folder.

If you have enabled **Electronic Signatures**, all the folders referenced under the **Electronic Signatures** section must be configured for *XLRwebpool* to have *Modify* and *Write* permissions.