## Create a Role in Jaspersoft

## To create a new role in the Jasper Reports server:

- 1. Login to Standalone as sysadmin.
- 2. Navigate to Manage > Roles > Add Role..

| RISK VISION TIBC® Jasperso | ft 🛖 Library View 🗸 | Manage 🗸 🛛 Create 🗸 | CMDashboarduser Help Q                   |
|----------------------------|---------------------|---------------------|--|
| © Organizations            | Roles               | Q                   | © Properties                             |
| = 📕 RiskVision             | Add Role Delete     |                     |  |
|                            | ROLE_ADMINISTRATOR  |                     |  |
|                            | ROLE_ANONYMOUS      |                     |  |
|                            | ROLE_AUTHOR         | Agiliance           |  |
|                            | ROLE_POWERUSER      | Agiliance           |  |
|                            | ROLE_USER           |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     |  |
|                            |                     |                     | Select a role to display its properties. |
|                            |                     |                     |  |
|                            |                     |                     |  |

The Roles settings in Jaspersoft.

3. Enter a name for the role in the **Role Name** field, then click **Add Role to Agiliance**. Spaces and special characters are not permitted.

| Add Role              |        |  |
|-----------------------|--------|--|
| Role Name (required): |        |  |
| STANDALONE_ROLE       |        |  |
|                       |        |  |
| Add Role to Agiliance | Cancel |  |

Adding a new role in Jaspersoft.

4. In the Properties section to the right, select the RiskVision users to add to the role from the Users Available pane, then click the > arrow to add the users to the Users Assigned pane. To remove users, select them in the Users Assigned pane, then click the < arrow.</p>

| Properties      |                |
|-----------------|----------------|
|                 |                |
| Role Name:      |                |
| STANDALONE_ROLE |                |
|                 |                |
|                 |                |
| Users Available | Users Assigned |
| Q               |                |
|                 |                |
| CMDashboarduser | rvJasperUser   |
| user            |                |
| user1           |                |
|                 |                |
|                 |                |
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|                 |                |
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|                 |                |
|                 |                |
|                 |                |
| Save Cancel     |                |
|                 |                |

Assigning users to a role in Jaspersoft.

## 5. Click Save.

- 6. In RiskVision, navigate to **Administration > Users > Roles**
- 7. Create a role in RiskVision, ensuring a selection is made from the **Jasper Role** dropdown menu, and assigning permissions as required. See the Create a New Role article for more information.

| New Role     |        |                     | ×         |
|--------------|--------|---------------------|-----------|
| Information  |        |                     |           |
| Name*        | RVRole |                     |           |
| Display Name |        |                     |           |
| Jasper Role  | User 🔻 |                     |           |
| Description  |        |                     |           |
|              |        |                     |           |
|              |        |                     |           |
| Default Home |        |                     |           |
| Page         |        | Dashboard Analytics | Clear     |
|              |        |                     |           |
|              |        |                     |           |
|              |        |                     |           |
|              |        |                     |           |
|              |        |                     | OK Cancel |

The New Role window in RiskVision.

8. From the new role's settings, click **Assigned Users > Add**, then select the same user(s) added to the Jaspersoft role in step 4 above.

| <b>RISK</b>  | VISI       | ON                |                       | Administration  | ▼ CMDasht                       | boarduser k     | User Settings | 📝 Configure UI          | Help   Log Out  | t |
|--|------------|-------------------|-----------------------|-----------------|---------------------------------|-----------------|---------------|-------------------------|-----------------|---|
| Administrat  | ion Us     | ers Events        |                       |                 |                                 |                 |               |                         |                 |   |
| Users Role   | es Teams   | s Filters         |                       |                 |                                 |                 |               |                         |                 |   |
| 🐻 Manage Syst  | tem Roles  |                   |                       |                 |                                 |                 |               |                         | _ 5             |   |
| 1-16 of 16   |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
| New Details  | Delete     | Reset Permissions | Refresh Permissions C | ache            |                                 |                 |               | Filter by - Show        | all - 🔻 Refresh |   |
|  | Name       |                   |                       |                 | <ul> <li>Description</li> </ul> |                 |               |                         |                 | - |
|  | Administra | tor               |                       |                 | RiskVision system               | n administrator |               |                         |                 |   |
|  | Analyst    |                   | _                     |                 | Dist. and Control.              | na              | alyst         |                         |                 |   |
|  | Configure  | UI                | Select Users          |                 |                                 | ×               |               |                         |                 | Ŧ |
| The second secon | e          |                   | Liner Dala            |                 |                                 |                 |               | *                       | Back – 🗆 🗴      |   |
|  |            |                   | User Name             | Any user role V | Search for users                |                 |               |                         |                 |   |
|  | ,          | Assigned Use      | rs over nume          |                 |                                 |                 |               |                         |                 |   |
|  |            | Add Details       | Remo                  |                 |                                 | <b>^</b>        | F             | ilter by - Show all - 1 | Refresh         |   |
|  |            | Login             |                       |                 |                                 |                 | Last Name     |                         |                 |   |
|  |            | No users          | have                  |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
| Information  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
| Applications   |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
| Access Filter  |            |                   |                       |                 |                                 | *               |               |                         |                 |   |
| Access Filler  | re b       |                   |                       |                 |                                 |                 |               |                         |                 |   |
| Assigned Oser  | 5 /        |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 | ОК                              | Cancel          |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |
|  |            |                   |                       |                 |                                 |                 |               |                         |                 |   |

Adding a user to a role in RiskVision.

- 9. Click Information in the menu to the left.
- 10. Click Configure UI to enable Configuration mode, then click OK to close the confirmation message.

| <b>RISK</b>    | VISI         | ON   | (B)  | Administration | •       | CMDashboarduser k   User Settin | gs 🕞 Configure UI Help   | Log Out        |
|----------------|--------------|--|--|----------------|---------|---------------------------------|--------------------------|----------------|
| Administrati   | on Use       | rs Events  |  |                |         |                                 |                          |                |
| Users Role     | s Teams      | Filters  |  |                |         |                                 |                          |                |
| 🐻 Manage Syst  | em Roles     |  |  |                |         |                                 |                          | - 0            |
| 1-16 of 16     |              |  |  |                |         |                                 |                          |                |
| New Details    | Delete       | Reset Permissions  | Refresh Permissions Cache                        |                |         |                                 | Filter by - Show all - 🔻 | Refresh        |
|                | Name         |  |  |                | A Descr | iption                          |                          | *              |
|                | Administrato | or   |  |                | RiskVi  | sion system administrator       |                          |                |
|                | Analyst      |  |  |                | Risk a  | nd Control compliance analyst   |                          |                |
|                | Configure U  | I  |  |                | N/A     |                                 |                          | *              |
| 🐻 Role: RVRole | •            |  |  |                |         |                                 | 📝 Edit 🧐 📲 Bac           | <b>k</b> – □ X |
|                |              | Information  |  |                |         |                                 |                          |                |
|                |              | Nam<br>Display Nam<br>Jasper Rol<br>Descriptio<br>Default Home Pag | e RVRole<br>e RVRole<br>e User<br>n N/A<br>e N/A |                |         |                                 |                          |                |
| Information    | >            |  |  |                |         |                                 |                          |                |
| Applications   |              |  |  |                |         |                                 |                          |                |
| Permissions    |              |  |  |                |         |                                 |                          |                |
| Access Filter  |              |  |  |                |         |                                 |                          |                |
| Assigned User  | 5            |  |  |                |         |                                 |                          |                |

The Information section of the role's settings.

11. Click the icon beside the Jasper Role field to open the Configure attribute window.

| 🐻 Role: RVRole                                      |   | 📝 Edit 😋 📲 Back — 🗖 🕽                       |
|---|---|---|
|   | You are in UI configuration mode.                     | Edit Layout   Refresh   Save   Undo   Reset |
|   | Information   |   |
|   | Name RVRole<br>Display Name RVRole<br>Jasper Role Ver |   |
| Edit Pane   Tabs   Reset<br>Layout: Import   Export | Default Home Page 📝 N/A                               |   |
| Information >                                       |   |   |
| Applications  |   |   |
| Permissions   |   |   |
| Access Filter                                       |   |   |
| Assigned Users                                      |   |   |

The Jasper Role field in the Information settings of the role.

12. Click Edit Options.

| Configure a  | ittribute        |              | ×         |
|--------------|------------------|--------------|-----------|
| Display name | Jasper Role      |              |           |
| Туре         | Drop-down list 🔹 | Edit options |           |
| Read-only    |                  |              |           |
| Hidden       |                  |              |           |
| Required     |                  |              |           |
|              |                  |              |           |
|              |                  |              |           |
|              |                  |              |           |
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|              |                  |              |           |
|              |                  |              |           |
|              |                  |              |           |
|              |                  |              |           |
|              |                  |              |           |
|              |                  |              | OK Cancel |
|              |                  |              |           |

The Configure attribute window.



14. Enter a label in the Label field and type the exact name of the Jaspersoft role created in step 3 above in the Value field.

| Edit the list of options  |  | ×      |
|---|--|--------|
| Create or update a list of po<br>The original list can be resto | ossible value for this attribute.<br>ored with the Undo command. |        |
| Label for "Select a value                                       |  |        |
| Label for "Create a new value"                                  | Create New   |        |
| Add an option   |  |        |
| Label   | Value  | Remove |
| User  | ROLE_USER  | ×      |
| Author  | ROLE_AUTHOR  | X      |
| Power User  | ROLE_POWERUSER   | X      |
| Administrator   | ROLE_ADMINISTRATOF   | X      |
| Jasper Role   | STANDALONE_ROLE  | X      |
|   |  |        |
|   |  |        |
|   |  |        |
|   |  |        |
|   |  | Cancel |

Adding the Jasper

- 15. Click **OK** to close attribute windows and save your changes.
- 16. Click **Configure UI (active)** in the top-right corner of the page to disable **Configuration mode**, then click **OK** to save your changes.
- 17. Navigate to Jaspersoft > View > Repository, ensuring you're still logged into Standalone.
- 18. Expand the **RiskVision** folders in the **Folders** tree to the left to display the folders you wish to apply role permissions on.
- 19. Right-click a folder, then select **Permissions.**

| <b>RISK VISION</b>   | TIBC   | 'Jaspersoft'   | •    | Library | View 🗸 | Manage 🗸 | Create 🗸 |     |
|--|--|----------------|------|---------|--------|----------|----------|-----|
| Folders  |  | Repository     |      |         |        |          |          |     |
| Public     RiskVision  |  | Run Edit       | Open | Сору    | Cut    | Paste De | lete     | Des |
| Ad Hoc C<br>Ad Hoc C<br>Dashboal<br>Domains<br>Domains<br>Domains<br>Organiza<br>Reports<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>Entity<br>En | omponents<br>rds<br>tions<br>/ Contextu<br>compliance<br>Add Folo<br>Add Res<br>Copy | ler<br>ource 🕨 |      |         |        |          |          |     |
| ± ⊔ ⊤  | Cut<br>Delete<br>Permissi<br>Properti<br>Export                                      | es             |      |         |        |          |          |     |

The Repository settings in Jaspersoft where you can apply role-specific permissions to each folder.

- 20. Apply permissions on the folder for the role created in step 3 above as needed. Note that RiskVision roles are automatically assigned the **ROLE\_USER** role in Jaspersoft and this role cannot be removed, but its settings may be overridden by following the instructions below:
  - To deny access to a folder, assign **No Access** permissions on the **ROLE\_USER** role and the RiskVision role.
  - To provide read-only access to a folder, assign **No Access** permissions on **ROLE\_USER** role and **Read Only** access the folder on the RiskVision role.

| iew by: User   Role |  |
|---------------------|--|
| (                   | * indicates inherited permission leve  |
| ROLE_ADMINISTRATOR  | Administer *   |
| ROLE_ANONYMOUS      | No Access *  |
| ROLE_AUTHOR         | Read + Write + Delete * ▼  |
| ROLE_POWERUSER      | Administer *   |
| ROLE_USER           | Read Only *  |
| STANDALONE_ROLE     | No Access *  |
| Apply OK Cancel     | No Access *<br>Administer<br>Read Only<br>Read + Write<br>Read + Delete<br>Read + Write + Delete<br>Execute Only |

Permission settings for a folder.

21. Click **Apply** to save your changes.