



Securing your Reporting Solution

In many applications, report content needs to be protected so that it cannot be altered by unauthorized persons.

XLReporter provides three approaches to report security:

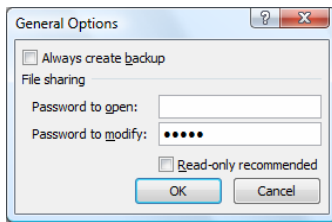
- Password protecting the report workbook.
- Publishing the report to PDF format.
- Using a secure viewer so users only have read access to the reports.

Protecting the Workbook

Excel workbook security is implemented by utilizing the password to modify setting provided by Excel. Once this is set, a user can only edit the workbook if they know the password.

To set this password to modify, open your report template in Excel and save the file using Excel's Save As option.

As part of the Save As operation, access the General Options of the file where you can set the Password to modify.

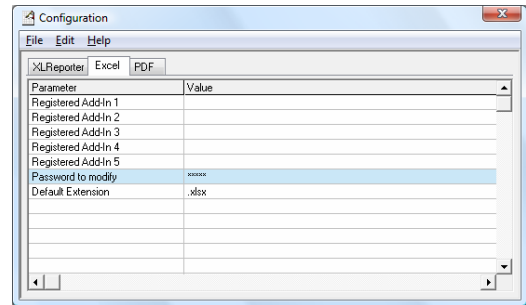


General Options

Because you have set this password for the report template, any report generated from this template will also have the same password set.

The final step is to provide **XLReporter** with the knowledge of this password so that it can perform its reporting functions.

From the Project Explorer, open the Configuration program. Under the Excel tab set the Password to modify to the password used in the template.



Excel settings in Configuration

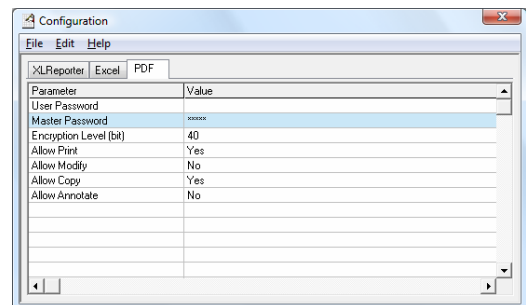
With the password specified, **XLReporter** can open the report for editing, but when a user tries to open the report in Excel, they will be prompted to enter the password. If they do not know it, they can continue by opening the report in read-only mode.

Publishing to PDF

XLReporter provides a PDF printer driver to automatically publish reports to encrypted PDF documents. This option is available in the Professional version of the product or as an option. The driver is self contained and does not require a third party software such as Adobe Acrobat.

A report is published to PDF file by using the PrintBook or PrintSheet commands (usually from the scheduler) and specifying **XLReporter's** PDF printer driver (XLRtoPDF) as the target printer.

XLReporter provides a number of settings that determine the properties of any PDF document published. These settings are found in **XLReporter's** Configuration program, under the PDF tab.



PDF settings in Configuration

The settings come into effect when you open the PDF document in a PDF viewer such as Adobe reader.

The Master Password can be set to protect the report from unauthorized access.

The Encryption level can be set at 40 or 128 bits, providing the desired encryption for the file.

Modification and Annotation can be toggled on or off.

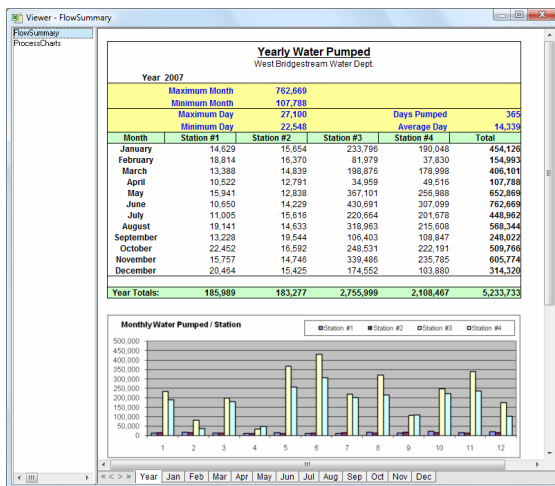
Print and Copy can be enabled or disabled, offering the required document handling capability on the local system.

Secure Viewing

The XLViewer software provides a centralized viewing environment for reports created in Excel, HTML or PDF file format. The XLViewer permits the viewing of the reports, but does not allow any editing to be performed.

The XLViewer is part of the **XLReporter Suite**, Professional or as an option.

When the XLViewer is launched, it provides a list of available reports. Users can then select a particular report which causes the contents of the report to appear in the read-only viewer. Note that the user is also prevented from accessing the windows desktop or file system.

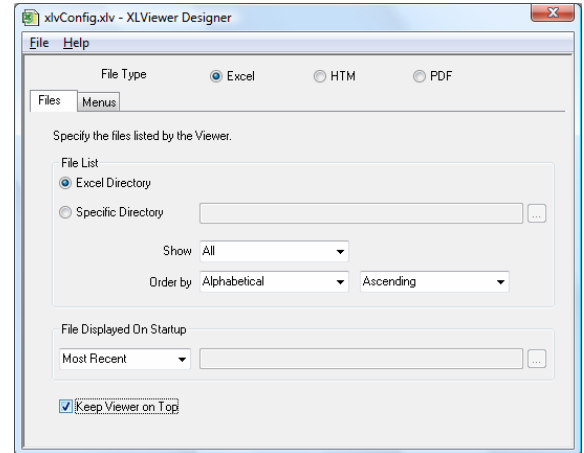


Report viewed in XLViewer

XLViewer is ideal way to provide operators access to reports from an HMI screen. Simply launch XLViewer from a pushbutton on a HMI display.

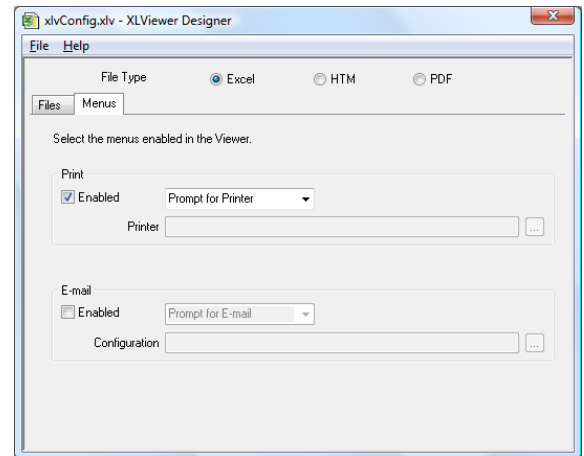
The XLViewer is completely customizable from the XLViewer designer.

Under the Files tab, you can specify where the reports are located and which reports to show, preventing users from accessing reports they do not need or should not see.



The XLViewer Designer – Files Tab

Under the Menus tab, you can enable or disable options that allow users to print or E-mail a report from the XLViewer.



The XLViewer Designer – Files Tab

These settings can be saved in a configuration file and specified as part of launching XLViewer.

SyTech, “The Report Company”, develops software for reporting and database management systems.

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