

## OVERVIEW

The Arius Enterprise® system includes role-based security through the **Portal Management** module. This is where you can manage users, manage roles, and assign users to roles, thereby restricting who has access to perform certain functions throughout the system. Users can be assigned roles at the site level, meaning the permissions apply across all databases within the site, or they can be assigned roles for a specific database. Any permission granted at the site-level supersedes those at the database level.

## SYSTEM ROLES

Each site contains three default system roles: **Site Admin**, **ToD Database Owner**, and **AA Database Owner**. At least one user must be assigned a **Site Admin** role. This role grants all permissions related to **Portal Management**, including the ability to create new databases and new users. Any user created and therefore granted access to a site will have read/view access to all the pages within the site. Any user with permission to create databases will automatically be assigned the **ToD Database Owner** role on any Triangles on Demand® (ToD) database they create and the **AA Database Owner** role on any Arius® Analysis database they create. These roles grant them all permissions associated with that application for the databases they create and can be a temporary assignment until other custom roles are created and assigned.

SYSTEM ROLE	PERMISSIONS GRANTED
Site Administrator	All permissions related to Portal Management
ToD Database Owner	All permissions related to Triangles on Demand
AA Database Owner	All permissions related to the Arius Analysis Tool

## CUSTOM ROLES

Additional roles can be customized to support your company's specific needs, and are defined separately within the Portal Management, Triangles on Demand, Arius Analysis Tool, or the Advanced Analytics applications. The following table summarizes the various permissions that are available for each role and the individual actions that are allowed within that permission.

### Portal Management Module

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Create AA DB	Create databases (including defining schema) Upload/delete CSV files (AA module)
Create ToD DB	Create databases (including defining schema) Upload/delete CSV files (ToD module)
Manage Performance	Scale up/down Microsoft Azure database performance settings Turn on/off Power BI (optional module)
Manage Roles	Create/edit/delete roles
Manage Site Access	Assign roles to users <ul style="list-style-type: none"> <li>at the site level (for all databases)</li> <li>or to specific databases</li> </ul>

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Manage Users	Create/edit/delete users to grant them access to the Portal

## Triangles on Demand Module

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Delete ToD DB	Delete ToD database
Load Data from ToD	Load data into an Arius project (via the Arius application or a Load Data script command) Create Segments
Manage Queries	Create/edit queries Delete queries Create/edit rollup definitions Delete rollup definitions Create/edit advanced queries Delete advanced queries Create/edit groups Delete groups
Manage ToD DB	Upload/delete CSV files (ToD module) Edit ToD database schema Create/edit/delete mappers Load data into ToD database Delete data loaded for a particular valuation date or CSV file Add/remove links to a secondary database
Manage ToD DB Access	Assign/remove roles to users (for a particular ToD database) <i>Users must have first been granted access to the Portal.</i>
Manage ToD DB Backups	Create DB backup Create archived backup Restore DB backup Restore archived backup (into new database) Delete DB backups Delete archived backups
Manage ToD Totals	Update button on ToD Totals Reconciliation page

## Arius Analysis Module

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Create Projects	Create new project (via web portal or Save script command) Copy project (via web portal or Save as Copy script command) Save as new Arius Enterprise project to database (from the Arius application)

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Create/Edit Extract Tables	Upload/delete CSV files (AA module) Create/edit extract tables Create/edit support tables Load/delete CSV files from support tables Create/edit reporting tables
Delete AA DB	Delete AA database
Delete Extract Tables	Delete extract tables Delete support tables Delete reporting tables
Delete Projects	Delete any project Delete Export to APJ zip files Delete Export to PDF zip files
Direct Import	Load data into an AA database via Direct Import <i>Update Project and Manage Scripts permissions are temporarily granted behind the scenes for this particular action</i>
Download Extract Tables	Download extract tables Download reporting tables
Lock UDO Library	Lock UDO Library (under AA database actions on web portal)
Manage AA DB Access	Assign/remove roles to users (for a particular AA database) <i>Users must have first been granted access to the Portal.</i>
Manage AA DB Backups	Create DB backup Create archived backup Restore DB backup Restore archived backup (into a new database) Restore from Point-in-time restore Delete DB backups Delete archived backups
Manage Scripts	Create/edit scripts Delete scripts Run scripts Run tasks Cancel batch process
Manage Mappers	Save Measure Mapper to DB
Manage Review Levels	Create/edit review levels Delete review levels
Manage UDO Library	Create new version of UDO Library (via Arius application)
Update Extract Tables	Update extract tables Run reporting tables
Unlock Project	Unlock project with status complete for projects that have review levels
Unlock UDO Library	Unlock UDO Library (under AA Database actions on web portal)
Update Extract Tables	Update extract tables

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Update Project	Open & check out project Open as read-only project Save & check in project (from Arius application) Undo check-out (from Arius application or web portal)
View Project	Open project as read-only Download Export to APJ zip files Download Export to PDF zip files

### Advanced Analytics Module

PERMISSIONS AVAILABLE	ACTIONS ALLOWED
Utilize Advanced Analytics	Run models via <b>Run Analysis</b> button Perform actions on individual models (upload to ToD, download results, etc.) <i>Note that Advanced Analytics is an optional module and all installations of Arius Enterprise may not include this module.</i>

## LISTING OF USERS AND ROLES

Any authorized user of the system can retrieve a list of all users and their assigned roles within the system. This is done via an API call with the following syntax:

`http://portalname-api.actuarialsoftware.com/accounts/?apikey={guid}`