

Granting Roles Permission to Use Segments in Searches and Reports

WARNING

This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

For every segment, you can control which roles can view and interact with the segment when working with searches and reports. You control this access by defining the Search/Reporting Access level for each role. You can also set a default access level, which applies to all roles that do not have an access level explicitly defined.

For details, see the following sections:

- [Scope of the Search/Reporting Access Permission](#)
- [Assigning the Search/Reporting Access Permission](#)

Scope of the Search/Reporting Access Permission

The following table describes the access associated with the various levels of the Search/Reporting Access permission.

Level	Users can:	Users cannot:
None	—	<ul style="list-style-type: none">• Use the segment as a search filter.• Use the segment as a column in search results.• View columns that reference custom segments in saved searches. The user can view the saved search, but columns referencing custom segments are omitted from the view.• View reports that use the segment as a filter or include it as a column.• Customize reports to use custom segments as filters or columns.
View	<ul style="list-style-type: none">• View saved searches that include custom segments in their results.• View reports that use the segment as a filter or include it as a column.	<ul style="list-style-type: none">• Use the segment as a search filter• Use the segment as a column in search results.• Customize reports to use custom segments as filters or columns.
Edit	<ul style="list-style-type: none">• View saved searches that include custom segments in their results.• View reports that use the segment as a filter or include it as a column.• Use the segment as a search filter.• Use the segment as a column in search results.• Customize reports to use custom segments as filters or columns.	—

Assigning the Search/Reporting Access Permission

Use the following steps to assign the Search/Reporting Access permission to a role.

To assign the Search/Reporting Access permission to a role:

1. Edit the custom segment.
2. Click the **Permissions** subtab.
3. For a role to have access, the role must be referenced in the Permissions sublist. Review the sublist to see if the role is already listed, then do one of the following:
 - If the role is not listed, add a line to the sublist: In the **Role** column, select the appropriate role. In the **Search/Reporting Access Level** column, select the required access level. Review the values for this role in the columns labeled **Value Management Access Level** and **Record Access Level**. Make any changes as needed. Be aware that the Value Management Access permission gives the user permission to create values, so review this column with care. For details, see [Granting a Role Permission to Manage Custom Segment Values](#). Then click **Add**.
 - If the role is already listed but does not have the ability to manage values, then edit the role's access. Locate the role in the sublist. Edit the corresponding value in the **Search/Reporting Access Level** column. Then click **OK**.
4. From the **Default Search/Reporting Access Level** list, set the default search/reporting access level. This access level applies to any role that is not listed in the Permissions sublist with a specific access level.
5. Click **Save**.

Related Topics