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Publishing Datasets

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CLOUDERA

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Setting the dataset recipient roles

About this task



Notice:

For more information on possible permissions, see *RBAC permissions*.

In this discussion, we demonstrate how to set up Dataset Recipient roles. Members can receive dataset access at one or more of the following levels:

- Manage dataset
- Manage dashboards
- View dashboards

Let us create three dataset roles: Data Admin, Analyst, and Visual Consumer for each for the three organization groups: Marketing, Sales, and Operations.

Restriction:

This task is for users with Manage roles and users privileges.

The steps for creating the role Marketing Data Admin.

Procedure

1. On the main navigation bar, click the Gear icon, and select Manage Roles.
2. In the Roles interface, start the new role by clicking New Role.
3. In the Role definition interface, enter the following information:
 - Name: Marketing Data Admin
 - Description: Creates datasets, can grant access to their datasets.

At a later time, we plan to define the privileges and the membership of the role.

The screenshot shows the Cloudera Data Visualization interface. At the top, there is a navigation bar with 'CLUDERA Data Visualization' and links for 'HOME', 'VISUALS', and 'DATA'. Below this is a secondary navigation bar with 'Activity Log', 'Users & Groups', 'Manage Roles', 'Manage API Keys', and 'Email Templates'. The main content area shows 'Roles / Role Detail' and 'Role: Marketing Data Admin'. There are two buttons: 'SAVE' (green) and 'UNDO' (blue). Below the buttons are two input fields: 'Name' with the value 'Marketing Data Admin' and 'Description' with the value 'Creates datasets, can grant access to their datasets.'

4. Click Save.
5. generates a success message.

6. Repeat the previous steps to generate a total of 9 (nine) new roles, with the following names and descriptions:

Table 1: Roles that receive access to new datasets

| Role Name | Description |
|----------------------------|---|
| Marketing Data Admin | Creates datasets, can grant access to their datasets. |
| Marketing Analyst | Can create dashboards. |
| Marketing Visual Consumer | Can view dashboards. |
| Sales Data Admin | Creates datasets, can grant access to their datasets. |
| Sales Analyst | Can create dashboards. |
| Sales Visual Consumer | Can view dashboards. |
| Operations Data Admin | Creates datasets, can grant access to their datasets. |
| Operations Analyst | Can create dashboards. |
| Operations Visual Consumer | Can view dashboards. |

Results

After completing these steps, the list of roles should appear similar to this:

Manage Roles

[+ NEW ROLE](#)

| Role / Description | Components | Users | Groups | |
|---|------------|-------|--------|-------------------------------------|
| Marketing Analyst Can create dashboards. | 1 | 0 | 0 | ✎ ⌵ |
| Marketing Data Admin Creates datasets, can grant access to their datasets. | 1 | 0 | 0 | ✎ ⌵ |
| Marketing Visual Consumer Can view dashboards. | 1 | 0 | 0 | ✎ ⌵ |
| Operations Analyst Can create dashboards. | 1 | 0 | 0 | ✎ ⌵ |
| Operations Data Admin Creates datasets, can grant access to their datasets. | 1 | 0 | 0 | ✎ ⌵ |
| Operations Visual Consumer Can view dashboards. | 1 | 0 | 0 | ✎ ⌵ |
| Sales Analyst Can create dashboards. | 1 | 0 | 1 | ✎ ⌵ |
| Sales Data Admin Creates datasets, can grant access to their datasets. | 1 | 0 | 1 | ✎ ⌵ |
| Sales Visual Consumer Can view dashboards. | 1 | 0 | 0 | ✎ ⌵ |

Related Information

[RBAC permissions](#)

Publishing datasets

About this task



Notice:

For more information on possible permissions, see *RBAC permissions*.

When a user creates a new dataset, that dataset is private by default. To share, user must explicitly grant others access to the new dataset.

In principal, anyone with Manage roles and users privileges can grant dataset access to others. However, we choose to restrict this privilege to a small number of people in the organization, typically system administrators. This is because

role editing is very powerful and role editors have full access to the entire system and can update any role to grant any permission to any user.

As a result, most dataset creators do not ordinarily have the Manage roles and users permission, and must place a service request so that system administrators add new datasets to the desired roles. In large organizations with multiple teams that consist of users with different responsibilities (dataset creators, dashboard creators, and dashboard viewers), access management becomes a laborious task.

Our RBAC security approach gives dataset creators an opportunity to 'publish' or share their datasets through a set of grants based on roles. They can grant access to specific roles through the Grant manage dataset, Grant manage dashboards, and Grant view dashboards permissions.

The following workflow is established to ensure that dataset creators can grant access to their datasets without having to rely on system administrators.



Note: Only users with Manage roles and users role privileges, typically system administrators, can set up the roles and permissions, and define users and user groups.

Before a dataset creator, Data Admin, can publish a dataset, they must have appropriate RBAC permissions, and the roles have to be assigned correctly to the members of each team. To understand how to configure the required permissions, roles, groups, and users, read RBAC setup for dataset publishing, which contains the following topics:

- *Setting the dataset recipient roles*
- *Setting the dataset publisher role*
- *Defining groups for teams and access levels*
- *Assigning groups to roles*
- *Assign users to groups*

After making all necessary adjustments to the dataset, a user with a Data Admin role can publish the dataset.

Restriction:

This workflow is intended for users with Data Admin role privileges.

This feature is only available after completing RBAC setup for dataset publishing.

Follow these steps to publish a dataset to the intended users.

Procedure

1. Log in as a user with Data Admin privileges. Here, we log in as user John_Marketing.
2. Navigate to the dataset you plan to publish. In our case, we plan to publish the Modified Iris Data dataset.
3. Click the Permissions option in the left navigation.

At this stage, the Permissions interface for the Modified Iris Data dataset appears. In this example, it contains the default matrix for roles and privileges for the three Data Admin roles for All datasets on the Arcadia Enterprise connection (Manage dataset, Manage dashboards, and View dashboards).

You can publish the dataset through one of the following actions:

Option

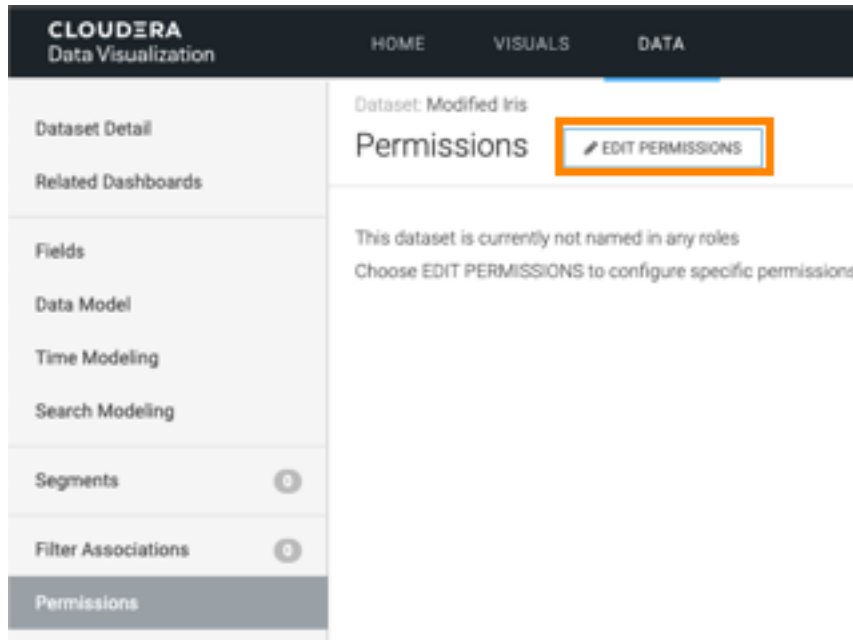
Publish

Makes the dataset publicly visible to the already enabled roles. You can stop here.

Edit Permissions

Allows the user to grant additional access permissions on the dataset. This is only available to users with Role permissions. If you choose this option, continue to the next step.

4. Click Edit Permissions.



The full Permissions matrix appears.

5. To grant the available privileges to the Modified Iris Data to the Marketing group, click the check boxes for the appropriate grants for the Data Admin, Analyst, and Visual Consumer roles defined in the Marketing group.

In this example, we granted all possible privileges. However, it is feasible that you may initially select only the Data Admin role, to involve others who have that role in testing the dataset and building preliminary dashboards. You can subsequently use this interface to grant access to other roles and users, such as Analysts who build more sophisticated dashboards, and postpone Visual Consumer access to a later time.

6. Click Save.

This action makes the dataset available to all specified roles.

Dataset: Modified Iris

Permissions

| Role | Connection / Dataset | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------------------|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Sales Visual Consumer | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sales Analyst | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing Analyst | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Marketing Visual Consumer | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sales Data Admin | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing Data Admin | samples / Modified Iris | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Operations Data Admin | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Operations Analyst | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Operations Visual Consumer | samples / Modified Iris | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Related Information

[RBAC permissions](#)

[RBAC setup for dataset publishing](#)

[Setting the dataset recipient roles](#)

[Setting the dataset publisher role](#)

[Define groups for teams and access levels](#)

[Assign groups to roles](#)

[Assign users to groups](#)

Setting the dataset publisher role

About this task



Note:

For more information on possible permissions, see *RBAC permissions*.

For the sake of this discussion, members of the Dataset Publisher Role have the privileges to grant dataset access to other users. This access is available in three forms:

- Grant manage dataset
- Grant manage dashboards
- Grant view dashboards

The granter must have the Grant manage dataset permissions on the target dataset.

We already created three (3) dataset publishing roles (data admins) in *Setting the dataset recipient roles*, one each for the three organization groups: Marketing, Sales, and Operations. These are Marketing Data Admin, Sales Data Admin, and Operations Data Admin, respectively. We also created the roles for the recipients of the grants, the analysts and the visual consumers.

Here are the steps for specifying the role Marketing Data Admin:

Procedure

1. In the Roles interface, click either the name of the role, Marketing Data Admin, or the Edit icon on its role.
2. In the Role Detail interface, click the Add Privilege button.

The screenshot shows the 'Role Detail' page for 'Marketing Data Admin' in the Arcadia Data system. The page includes a header with the Arcadia Data logo and navigation links (HOME, VISUALS, DATA). Below the header, there are 'SAVE' and 'UNDO' buttons. The role's name is 'Marketing Data Admin' and its description is 'Creates datasets, can grant access to their datasets'. There are tabs for 'Privileges' and 'Members'. A table of privileges is displayed, with a diagonal bar highlighting the following columns: 'Create workspaces', 'Manage roles and users', 'Manage site settings', 'Manage custom styles', 'Manage jobs, email templates', 'View activity logs', 'Manage data connections', 'Grant manage dataset', 'Grant manage dashboards', 'Grant view dashboards', 'Manage analytical views', 'Import data', 'Create datasets, explore tables', 'Manage dataset', 'Manage dashboards', and 'View dashboards'. The 'System' component is selected. An '+ ADD PRIVILEGE' button is visible at the bottom.

The Add Privilege modal window appears.

3. Create the following privilege:
4. Under Component Type, select Role.
5. From Roles(s), select Marketing Data Admin, a role we defined previously.

Note that this enables individuals with the Marketing Data Admin role to grant privileges to others with the same role.

- Click Create.

Add Privilege ✕

Component Type Role

Roles(s) * Marketing Data Admin ✕

CANCEL
CREATE

- Leave this privilege with all options on, and click the Add Privilege button to add the next privilege.

ARCADIA DATA
HOME VISUALS DATA
HELP admin

Roles / Role Detail

Role: Marketing Data Admin

SAVE UNDO

Name

Description

Privileges Members

| Component | Type | ☑ | Create workspaces | Manage roles and users | Manage styles and settings | View activity logs | Manage data connections | Grant manage dataset | Grant view dashboards | Manage analytical views | Import data | Create datasets, explore tables | Manage dataset | Manage dashboards | View dashboards |
|----------------------|------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| System | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing Data Admin | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

+ ADD PRIVILEGE

- Under Component Type, select Role.
- From Roles(s), select Marketing Analyst, a role we defined previously.

10. Click Create.

Add Privilege ✕

Component Type: Role

Roles(s) *: Marketing Analyst ✕

CANCEL
CREATE

11. Deselect the Grant manage dataset option for this privilege.

This is because analysts should not be altering the dataset.

12. Click the Add Privilege button to add the next privilege.

ARCADIA DATA HOME VISUALS DATA HELP admin

Roles / Role Detail

Role: Marketing Data Admin

SAVE UNDO

Name:

Description:

Privileges Members

| Component | Type | | Create workspaces | Manage roles and users | Manage styles and settings | View activity logs | Manage data connections | Grant manage dataset | Grant manage dashboards | Grant view dashboards | Manage analytical views | Import data | Create datasets, explore tables | Manage dataset | Manage dashboards | View dashboards |
|----------------------|------|-------------------------------------|--------------------------|--------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|---------------------------------|--------------------------|--------------------------|--------------------------|
| System | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing Data Admin | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing Analyst | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

+ ADD PRIVILEGE

13. Under Component Type, select Role.

14. From Roles(s), select Marketing Visual Consumer, a role we defined previously.

15. Click Create.

Add Privilege ✕

Component Type: Role

Roles(s) *: Marketing Visual Consumer ✕

16. Unselect the Grant manage dataset and Grant manage dashboards options for this privilege. This is because visual consumers can only view dashboards, and should not be altering the dataset or creating new dashboards. Therefore, this line contains only the Grant view dashboards option.

17. Click the Add Privilege button to add the next privilege.

ARCADIA DATA HOME VISUALS DATA HELP admin

Roles / Role Detail

Role: Marketing Data Admin

Name: Marketing Data Admin

Description: Creates datasets, can grant access to their datasets.

Privileges Members

| Component | Type | | Create workspaces | Manage roles and users | Manage styles and settings | View activity logs | Manage data connections | Grant manage dataset | Grant manage dashboards | Grant view dashboards | Manage analytical views | Import data | Create datasets, explore tables | Manage dataset | Manage dashboards | View dashboards |
|---------------------------|------|-------------------------------------|--------------------------|--------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------|-------------------------|-------------|---------------------------------|----------------|-------------------|--------------------------|
| System | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | |
| Marketing Data Admin | | <input checked="" type="checkbox"/> | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| Marketing Analyst | | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| Marketing Visual Consumer | | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |

This time, let us declare connection-level privileges so that the Marketing Data Admin can access connected data, build datasets, and import supplemental data. Depending on the operational structure, we may also let the users with this role manage analytical views.

18. In the Add Privilege modal window, create the connection-level privileges necessary for the Marketing Data Admin user. This particular privilege enables access to all data available through the specified connection:

19. Under Component Type, select Connection.

20. From Connection(s), select Impala.

21. Click Create.

Add Privilege ✕

Component Type Connection ▾

Connection(s) * Arcadia Enterprise ✕ |

CANCEL CREATE

22. Leave this privilege with all options on (Manage analytical views, Import data, and Create datasets, explore tables).

23. Click the Add Privilege button to add the next privilege.

ARCADIA DATA HOME VISUALS DATA ⚙️ HELP 👤 admin ▾

Roles / Role Detail

Role: Marketing Data Admin

SAVE UNDO

Name

Description

Privileges Members

| Component | Type | | Create workspaces | Manage roles and users | Manage styles and settings | View activity logs | Manage data connections | Grant manage dataset | Grant view dashboards | Manage analytical views | Import data | Create datasets, explore tables | Manage dataset | Manage dashboards | View dashboards |
|---------------------------|------------|-------------------------------------|--------------------------|--------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|----------------|-------------------|--------------------------|
| System | System | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | |
| Marketing Data Admin | Role | <input checked="" type="checkbox"/> | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | <input type="checkbox"/> |
| Marketing Analyst | Role | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | <input type="checkbox"/> |
| Marketing Visual Consumer | Role | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | <input type="checkbox"/> |
| Arcadia Enterprise | Connection | <input checked="" type="checkbox"/> | | | | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> |

+ ADD PRIVILEGE

Finally, we declare dataset-level privileges. We can choose previously declared connections and limit access to a few of its datasets, or select a new connection, or choose all datasets on a connection. Here, we simply let members of the Marketing Data Admin role access all existing datasets on the Arcadia Enterprise connection.

24. In the Add Privilege modal window, create the connection-level privileges necessary for the Marketing Data Admin user. This particular privilege enables access to all data available through the specified connection.

25. Under Component Type, select Dataset.

26. From Connection(s), select Arcadia Enterprise.

27. From Dataset(s), select All datasets.

28. Click Create.

Add Privilege ✕

Component Type

Dataset

Connection *

Arcadia Enterprise

Dataset(s) *

All datasets ✕

CANCEL
CREATE

29. Leave this privilege with all options on (Manage dataset, Manage dashboards, and View dashboards)

30. Click Save at the top of the page to save the new definition of the Marketing Data Admin role.

ARCADIA DATA
HOME VISUALS DATA
HELP admin

Roles / Role Detail

Role: Marketing Data Admin

SAVE
UNDO

Name

Description

Privileges
Members

| Component | Type | ☑ | Create workspaces | Manage roles and users | Manage styles and settings | View activity logs | Manage data connections | Grant manage dataset | Grant manage dashboards | Grant view dashboards | Manage analytical views | Import data | Create datasets, explore tables | Manage dataset | Manage dashboards | View dashboards |
|-----------------------------------|------|-------------------------------------|--------------------------|--------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| System | ☰ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | |
| Marketing Data Admin | 👤 | <input checked="" type="checkbox"/> | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| Marketing Analyst | 👤 | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| Marketing Visual Consumer | 👤 | <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| Arcadia Enterprise | 🔗 | <input checked="" type="checkbox"/> | | | | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | <input type="checkbox"/> |
| Arcadia Enterprise / All datasets | 🔗 | <input checked="" type="checkbox"/> | | | | | | | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

+ ADD PRIVILEGE

31. Repeat the previous steps to add privileges to the roles of the Sales Data Admin and Operations Data Admin. Each of these roles should have a privilege matrix that is similar to privileges assigned to the Marketing Data Admin role.

Table 2: Privileges assigned to the Data Admin roles



















| Role Name | Component | Permission |
|-----------------------|---|---|
| Marketing Data Admin | Role: Marketing Data Admin | <ul style="list-style-type: none"> Grant manage dataset Grant manage dashboards Grant view dashboards |
| | Role: Marketing Analyst | <ul style="list-style-type: none"> Grant manage dashboards Grant view dashboards |
| | Role: Marketing Visual Consumer | <ul style="list-style-type: none"> Grant view dashboards |
| | Connection: Arcadia Enterprise | <ul style="list-style-type: none"> Manage analytical views Import data Create datasets, explore tables |
| | Dataset: Arcadia Enterprise, All Datasets | <ul style="list-style-type: none"> Manage dataset Manage dashboards View dashboards |
| Sales Data Admin | Role: Sales Data Admin | <ul style="list-style-type: none"> Grant manage dataset Grant manage dashboards Grant view dashboards |
| | Role: Sales Analyst | <ul style="list-style-type: none"> Grant manage dashboards Grant view dashboards |
| | Role: Sales Visual Consumer | <ul style="list-style-type: none"> Grant view dashboards |
| | Connection: Arcadia Enterprise | <ul style="list-style-type: none"> Manage analytical views Import data Create datasets, explore tables |
| | Dataset: Arcadia Enterprise, All Datasets | <ul style="list-style-type: none"> Manage dataset Manage dashboards View dashboards |
| Operations Data Admin | Role: Operations Data Admin | <ul style="list-style-type: none"> Grant manage dataset Grant manage dashboards Grant view dashboards |
| | Role: Operations Analyst | <ul style="list-style-type: none"> Grant manage dashboards Grant view dashboards |
| | Role: Operations Visual Consumer | <ul style="list-style-type: none"> Grant view dashboards |
| | Connection: Arcadia Enterprise | <ul style="list-style-type: none"> Manage analytical views Import data Create datasets, explore tables |
| | Dataset: Arcadia Enterprise, All Datasets | <ul style="list-style-type: none"> Manage dataset Manage dashboards View dashboards |

Results

After completing these steps, the list of roles shows that the number of components on the Data Admin roles increased to 6 (six):

Roles

[+ NEW ROLE](#)

| Role / Description | Components | Users | Groups | |
|---|------------|-------|--------|---|
| Marketing Data Admin Creates datasets, can grant access to their datasets. | 6 | 0 | 0 |   |
| Marketing Analyst Can create dashboards. | 1 | 0 | 0 |   |
| Marketing Visual Consumer Can view dashboards. | 1 | 0 | 0 |   |
| Sales Data Admin Creates datasets, can grant access to their datasets. | 6 | 0 | 0 |   |
| Sales Analyst Can create dashboards. | 1 | 0 | 0 |   |
| Sales Visual Consumer Can view dashboards. | 1 | 0 | 0 |   |
| Operations Data Admin Creates datasets, can grant access to their datasets. | 1 | 0 | 0 |   |
| Operations Analyst Can create dashboards. | 1 | 0 | 0 |   |
| Operations Visual Consumer Can view dashboards. | 6 | 0 | 0 |   |

Related Information

[Setting the dataset recipient roles](#)

[RBAC permissions](#)

Define groups for teams and access levels

Procedure

1. Create the groups of users by organizational team, and by level of required access.
 - There are three distinct access levels across the organization: Data Admins, Analysts, and Visual Consumers.
 - There are three teams: Marketing, Sales, and Operations.

The following steps demonstrate how to create the necessary user groups in Data Visualization. Note that depending on your architecture, this definition may happen at the LDAP layer, with the groups visible to Data Visualization.

2. On the main navigation bar, click the Gear, and select Users & Groups.
3. In the Manage Users & Groups interface, click New Group.
4. In the New Group window modal, create a new group Data_Admins.
5. [Optional] You may choose to add users to the group at this point, but we plan to do this at a later stage.
6. Click Save.
7. Repeat these steps to create additional new user groups: Analysts, Visual_Consumers, Marketing, Sales, and Operations.

Assign groups to roles

About this task

Now we must correctly assign the membership groups to roles.

- There are three distinct access levels across the organization: Data Admins, Analysts, and Visual Consumers.
- There are three teams: Marketing, Sales, and Operations.

The following steps demonstrate how to create the necessary user groups in ArcViz. Note that depending on your architecture, this definition may happen at the LDAP layer, with groups visible to Data Visualization.

Procedure

1. On the main navigation bar, click the Gear icon, and select Manage Roles.
2. In the Roles interface, click either the name of the role, Marketing Data Admin, or the Edit icon on its role.
3. In the Role Detail interface, select the Members tab.

- In Groups section, click Edit Group(s).

The screenshot shows the 'Role: Marketing Data Admin' configuration page in the Arcadia Data interface. The page has a dark header with the Arcadia Data logo and navigation links for HOME, VISUALS, and DATA. On the right of the header are settings, help, and a user profile dropdown for 'admin'. Below the header, the breadcrumb 'Roles / Role Detail' is visible. The main title is 'Role: Marketing Data Admin'. There are two buttons: 'SAVE' and 'UNDO'. Below these are two text input fields: 'Name' containing 'Marketing Data Admin' and 'Description' containing 'Creates datasets, can grant access to their datasets.'. There are two tabs: 'Privileges' (selected) and 'Members'. Under the 'Members' tab, there are two sections: 'Users' and 'Groups'. The 'Users' section has a count of 0 and an 'EDIT USER(S)' button. The 'Groups' section has a count of 0, a 'Require all groups' checkbox, and an 'EDIT GROUP(S)' button which is highlighted with a red box. Below the 'Users' section, there is a table with columns 'Username', 'First Name', and 'Last Name', and a note: '(these users were explicitly added and are not necessarily part of the added groups)'. The 'Groups' section has a 'Group Name' column.

The Role Assignment modal window appears.

- Select the groups Data_Admins and Marketing.
- Click Add.

7. Click Apply.

Role Assignment ✕

Members

🔍

Available to select

- Select All

- Analysts
- Data_Admins
- Marketing
- Operations
- Sales
- Visual_Consumers

ADD >>

<<

Selected

Select groups from the left to add to the role's members

+ ADD

CANCELAPPLY

- The Groups list now contains Data_Admins and Marketing.
8. Select the Require all groups option.

9. Click Save.

A confirmation message appears briefly.

ARCADIA DATA HOME VISUALS DATA HELP admin

Roles / Role Detail

Role: Marketing Data Admin

Name Marketing Data Admin

Description Creates datasets, can grant access to their datasets.

Privileges Members

Users 0

Groups 2 Require all groups

| Username | First Name | Last Name | Group Name |
|--|------------|-----------|-------------|
| (these users were explicitly added and are not necessarily part of the added groups) | | | Data_Admins |
| | | | Marketing |

10. Repeat the previous steps to assign groups to the rest of the roles, according to the following information. Remember that you must use the Require all groups option.

Table 3: Roles and their group assignments



















| Role Name | Assigned groups |
|----------------------------|--|
| Marketing Data Admin | <ul style="list-style-type: none"> Data_Admins Marketing |
| Marketing Analyst | <ul style="list-style-type: none"> Analysts Marketing |
| Marketing Visual Consumer | <ul style="list-style-type: none"> Visual_Consumers Marketing |
| Sales Data Admin | <ul style="list-style-type: none"> Data_Admins Sales |
| Sales Analyst | <ul style="list-style-type: none"> Analysts Sales |
| Sales Visual Consumer | <ul style="list-style-type: none"> Visual_Consumers Sales |
| Operations Data Admin | <ul style="list-style-type: none"> Data_Admins Operations |
| Operations Analyst | <ul style="list-style-type: none"> Analysts Operations |
| Operations Visual Consumer | <ul style="list-style-type: none"> Visual_Consumers Operations |

What to do next

After completing these steps, the list of roles shows that the number of groups for each role is now 2 (two):

Roles

[+ NEW ROLE](#)

| Role / Description | Components | Users | Groups | |
|---|------------|-------|--------|---|
| Marketing Data Admin Creates datasets, can grant access to their datasets. | 6 | 0 | 2 |   |
| Marketing Analyst Can create dashboards. | 1 | 0 | 2 |   |
| Marketing Visual Consumer Can view dashboards. | 1 | 0 | 2 |   |
| Sales Data Admin Creates datasets, can grant access to their datasets. | 6 | 0 | 2 |   |
| Sales Analyst Can create dashboards. | 1 | 0 | 2 |   |
| Sales Visual Consumer Can view dashboards. | 1 | 0 | 2 |   |
| Operations Data Admin Creates datasets, can grant access to their datasets. | 1 | 0 | 2 |   |
| Operations Analyst Can create dashboards. | 1 | 0 | 2 |   |
| Operations Visual Consumer Can view dashboards. | 6 | 0 | 2 |   |

Assign users to groups

About this task

Depending on your installation/migration scenario and security configuration, you may already have the required users, and they may already be assigned to the correct groups.

To continue our example, we show how to create new users and assign them to the groups. Appropriate group membership automatically endows the user with the required role.

The following steps demonstrate how to create the necessary users and assign them to user groups in Data Visualization.

Procedure

1. On the main navigation bar, click Gear the icon.
2. Select Users & Groups
3. In the Manage Users & Groups interface, click New User.
4. In the New User modal window, enter the following information:
 - Name: John_Marketing
 - Password: password of your choice.
 - Permissions: Select Normal user.
 - Under Groups tab, select Data Admin and Marketing.

5. Click Add to move these groups to the right column, and then click Save.

Note that in this process, we will not assign users to roles directly, but through the group membership only.

New User ×

Username

Password

 Show Password

Permissions

Normal user - can access Arcadia site

Admin user - have all permissions to site

Groups Roles

Group Membership

Search

| Available to select | | Selected |
|---|--|------------------------------|
| <input type="checkbox"/> Select All | <input checked="" type="button" value="ADD >>"/> | Select options from the left |
| <input type="checkbox"/> Analysts | <input type="button" value="<<"/> | |
| <input checked="" type="checkbox"/> Data_Admins | | |
| <input checked="" type="checkbox"/> Marketing | | |
| <input type="checkbox"/> Operations | | |
| <input type="checkbox"/> Sales | | |
| <input type="checkbox"/> Visual_Consumers | | |
| <input type="text" value="New group name"/> | <input type="button" value="+ ADD"/> | |

6. Repeat the previous steps to create new users and assign groups to them, according to the following information. This is a minimal set of users that 'populates' each role. We can have multiple users assigned to the same groups.

Table 4: Users and their group assignments

| Role Name | Assigned groups |
|--------------------|--|
| John_Marketing | <ul style="list-style-type: none"> Data_Admins Marketing |
| Kate_Marketing | <ul style="list-style-type: none"> Analysts Marketing |
| Lauren_Marketing | <ul style="list-style-type: none"> Visual_Consumers Marketing |
| Adele_Sales | <ul style="list-style-type: none"> Data_Admins Sales |
| Beyonce_Sales | <ul style="list-style-type: none"> Analysts Sales |
| Cher_Sales | <ul style="list-style-type: none"> Visual_Consumers Sales |
| Xuong_Operations | <ul style="list-style-type: none"> Data_Admins Operations |
| Yoneda_Operations | <ul style="list-style-type: none"> Analysts Operations |
| Zariski_Operations | <ul style="list-style-type: none"> Visual_Consumers Operations |

What to do next

After completing these steps, check the list of users, and notice that it shows the assigned roles. This is because we completed the group-role mapping already, as described in *Assigning groups to roles*.

A **ARCADIA DATA**
HOME
VISUALS
DATA

⚙️
HELP ▾
admin ▾

Manage Users & Groups

NEW USER
NEW GROUP

Users 10
Groups 9

+ ADD TO GROUP ▾
+ ADD TO ROLES ▾
DELETE

| <input type="checkbox"/> | Username | Permissions | Date Joined | Last Login | Member of Group(s) | Roles | Status | |
|--------------------------|--------------------|-------------|-------------------|-------------------|------------------------------|----------------------------|---|---|
| <input type="checkbox"/> | admin | Admin | 2 years ago | 22 minutes ago | | | A | ✎ 🗑️ |
| <input type="checkbox"/> | John_Marketing | Normal | 2 hours ago | an hour ago | Marketing, Data_Admins | Marketing Data Admin | A | ✎ 🗑️ |
| <input type="checkbox"/> | Kate_Marketing | Normal | 21 minutes ago | 21 minutes ago | Marketing, Analysts | Marketing Analyst | A | ✎ 🗑️ |
| <input type="checkbox"/> | Lauren_Marketing | Normal | 20 minutes ago | 20 minutes ago | Marketing, Visual_Consumers | Marketing Visual Consumer | A | ✎ 🗑️ |
| <input type="checkbox"/> | Adele_Sales | Normal | 13 minutes ago | 13 minutes ago | Sales, Data_Admins | Sales Data Admin | A | ✎ 🗑️ |
| <input type="checkbox"/> | Beyonce_Sales | Normal | 13 minutes ago | 13 minutes ago | Sales, Analysts | Sales Analyst | A | ✎ 🗑️ |
| <input type="checkbox"/> | Cher_Sales | Normal | 11 minutes ago | 11 minutes ago | Sales, Visual_Consumers | Sales Visual Consumer | A | ✎ 🗑️ |
| <input type="checkbox"/> | Xuong_Operations | Normal | a minute ago | a minute ago | Data_Admins, Operations | Operations Data Admin | A | ✎ 🗑️ |
| <input type="checkbox"/> | Yoneda_Operations | Normal | a few seconds ago | a few seconds ago | Operations, Analysts | Operations Analyst | A | ✎ 🗑️ |
| <input type="checkbox"/> | Zariski_Operations | Normal | a few seconds ago | a few seconds ago | Operations, Visual_Consumers | Operations Visual Consumer | A | ✎ 🗑️ |

Related Information

[Assign groups to roles](#)