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Configuring Restricting Row-Level Access

Date published: 2020-10-30

Date modified: 2022-09-21

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Setting segments

About this task

To specify segments in the dataset, you can save information from the Filters shelf of a visual as a segment. Follow the steps outlined in our article *Creating Segments from Filter Definitions*.

Alternatively, you can specify the filters in the Dataset Segments interface, as described in *Creating Segments*.

Procedure

Define the following segments:

Table 1: Definitions of Segments on the Dataset US County Population

Group	Name	Filters
Geographic Regions	California	([State] in ('California'))
Geographic Regions	Mountain	([State] in ('Arizona', 'Nevada'))
Geographic Regions	North West	([State] in ('Washington', 'Oregon'))

After you define these segments in your dataset, your Dataset Segments interface should look like this:

Group	Entity Name	Apply To New Visuals	Filters	Actions
Geographic Regions	California		([State] in ('California'))	Edit Clone Delete
Geographic Regions	Mountain		([State] in ('Arizona', 'Nevada'))	Edit Clone Delete
Geographic Regions	North West		([State] in ('Washington', 'Oregon'))	Edit Clone Delete

Related Information

[Creating segments from filter definitions](#)

[Creating segments](#)

Creating users and user groups

Procedure

1. Create a user group for all sales representatives. In the Manage Users & Groups interface, create a user group named Sales Reps.

See, *Creating new user groups*.

After you define this user group, your Manage Users & Groups interface should look like this:

Group	# Members	Members	Roles
SalesReps	0		

2. Define the following users, with normal user permissions, and assign them to the SalesReps user group:

- AZrep1
- CArep1
- CArep2
- NVrep1
- ORrep1
- WArepl

See, *Creating new user accounts* and *Adding users to user groups*.

After you create these users, your Manage Users & Groups interface should look like this:

Manage Users & Groups

NEW USER NEW GROUP

Users Groups

ADD TO GROUP ADD TO ROLE DELETE

<input type="checkbox"/>	Username (first last)	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
<input type="checkbox"/>	AZrep1	Normal	a minute ago	Never	SalesReps		ON
<input type="checkbox"/>	CArep1	Normal	a minute ago	Never	SalesReps		ON
<input type="checkbox"/>	CArep2	Normal	a few seconds ago	Never	SalesReps		ON
<input type="checkbox"/>	NVrep1	Normal	a few seconds ago	Never	SalesReps		ON
<input type="checkbox"/>	ORrep1	Normal	a few seconds ago	Never	SalesReps		ON
<input type="checkbox"/>	WArepl	Normal	a few seconds ago	Never	SalesReps		ON

Related Information

[Creating new user groups](#)

[Creating new user accounts](#)

[Adding users to user groups](#)

Setting roles

About this task

To specify roles that restrict row-level access, we need to define the appropriately restrictive roles, and assign individual users or user groups to them.

Procedure

1. Follow the instructions covered in our articles *Creating Segments from Filter Definitions*, *Role privileges*, and *Editing role assignments*.

2. Define a role with following specifications:

Name

See_Customer_Data

Description

Sales Reps can see customer data

On the Privileges interface, we have:

System Privileges

None

Dataset Privileges

Customer Value Analysis dataset, on the sample connection (this may vary depending on where you loaded the data).

Permission

View visuals and apps

Role: See_Customer_Data

SAVE UNDO

Name: See_Customer_Data

Description: Sales Reps can see customer data

Privileges Members

Component	Type		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 view dashboards	Manage AV/Extracts	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"/>	<input type="checkbox"/>	<input type="checkbox"/>										
samples / All datasets	Dataset	<input type="checkbox"/>													<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ADD PRIVILEGE

On the Members interface, we have:

Users

None

Groups

SalesReps

Role: See_Customer_Data

Name

Description

Privileges Members

Require all groups

Username	First Name	Last Name
(these users were explicitly added and are not necessarily part of the added groups)		

Group Name
SalesReps

Related Information

[Editing role assignments](#)

[Role privileges](#)

[Creating segments from filter definitions](#)

Setting filter associations

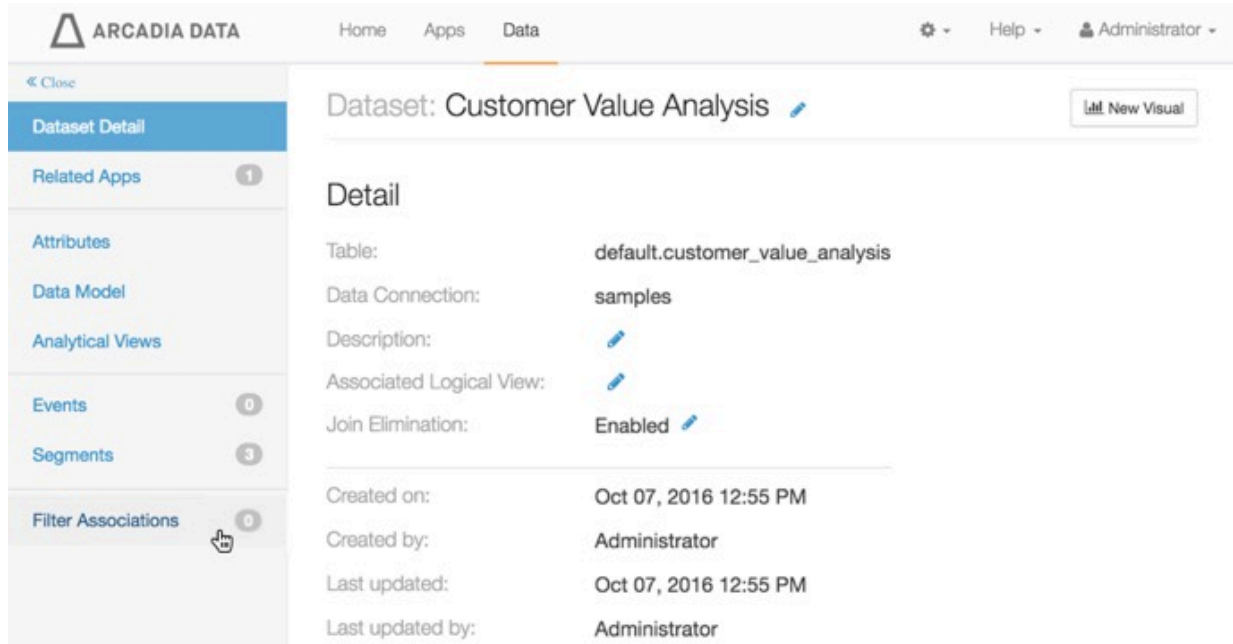
About this task

The final task in restricting user or user group access is to specify filter associations.

Procedure

- 1.
2. In the left navigation menu, click Samples.
3. In the Datasets area, select Customer Value Analysis.

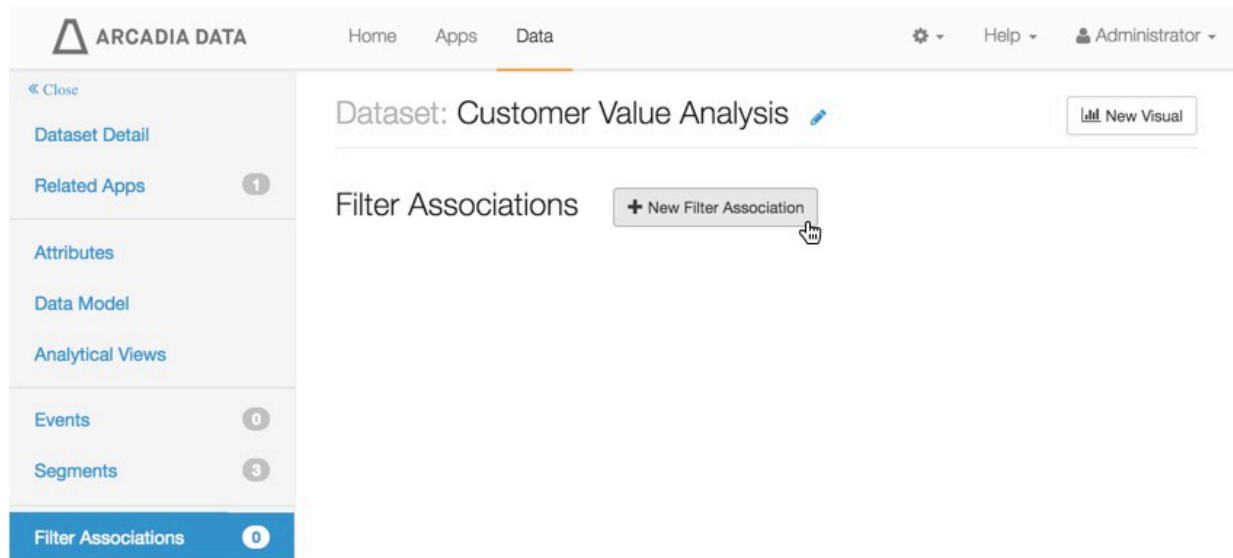
- In the Dataset Detail menu, select Filter Associations.



The screenshot shows the Arcadia Data interface. The top navigation bar includes the Arcadia Data logo, 'Home', 'Apps', and 'Data' tabs, along with settings, help, and user profile options. The left sidebar menu is open, showing options like 'Dataset Detail', 'Related Apps', 'Attributes', 'Data Model', 'Analytical Views', 'Events', 'Segments', and 'Filter Associations'. The 'Filter Associations' option is highlighted, and a mouse cursor is pointing at it. The main content area displays the 'Dataset: Customer Value Analysis' details, including table name, data connection, description, associated logical view, join elimination status, and creation/update information.

Table:	default.customer_value_analysis
Data Connection:	samples
Description:	Edit
Associated Logical View:	Edit
Join Elimination:	Enabled Edit
Created on:	Oct 07, 2016 12:55 PM
Created by:	Administrator
Last updated:	Oct 07, 2016 12:55 PM
Last updated by:	Administrator

- In the Filter Associations interface, click New Filter Association.



The screenshot shows the Arcadia Data interface with the 'Filter Associations' option selected in the left sidebar. The main content area displays the 'Filter Associations' section for the 'Dataset: Customer Value Analysis'. A button labeled '+ New Filter Association' is visible, and a mouse cursor is pointing at it.

- 6.** In the Add Filter Association window modal, perform the following actions:
 - a.** Under Filter Association Name, enter CA SalesReps.
 - b.** Under Applied Segments, select is California from Geographic Regions.
 - c.** On the Users tab, select users CArep1 and CArep2, and Add them to the filter association.
 - d.** Click Create.

Add Filter Association ✕

Filter Association Name

CA SalesReps **1**

Applied Segments

Geographic Regions

is California **2**

is Mountain

is North West

Search Users

Search

Available to select

Select All

AZrep1

Administrator

ArcadiaUser

NVrep1

ORrep1

WAreps1

admin

Selected

Select All

CArep1

CArep2

3

4

7. Note that the new filter association now appears on the Filter Associations interface.

ARCADIA DATA Home Apps Data ⚙️ Help Administrator

Dataset: Customer Value Analysis New Visual

Filter Associations + New Filter Association

These Filter Associations were created on this dataset

Name	Segments	Users	Groups	Actions
CA SalesReps	California	CArep1, CArep2		Edit Delete

8. Repeat, and add two more filter associations, as follows:

Table 2: Definitions of Segments on the Dataset Customer Value Analysis

Filter Association Name	Applied Segment	Users to Include
Mountain SalesReps	Mountain	NVrep1, AZrep1
North West SalesReps	North West	ORrep1, WArepl

After you define these filter associations in your dataset, your Filter Associations interface should look like this:

ARCADIA DATA Home Apps Data ⚙️ Help Administrator

Dataset: Customer Value Analysis New Visual

Filter Associations + New Filter Association

These Filter Associations were created on this dataset

Name	Segments	Users	Groups	Actions
CA SalesReps	California	CArep1, CArep2		Edit Delete
Mountain SalesReps	Mountain	NVrep1, AZrep1		Edit Delete
North West SalesReps	North West	ORrep1, WArepl		Edit Delete

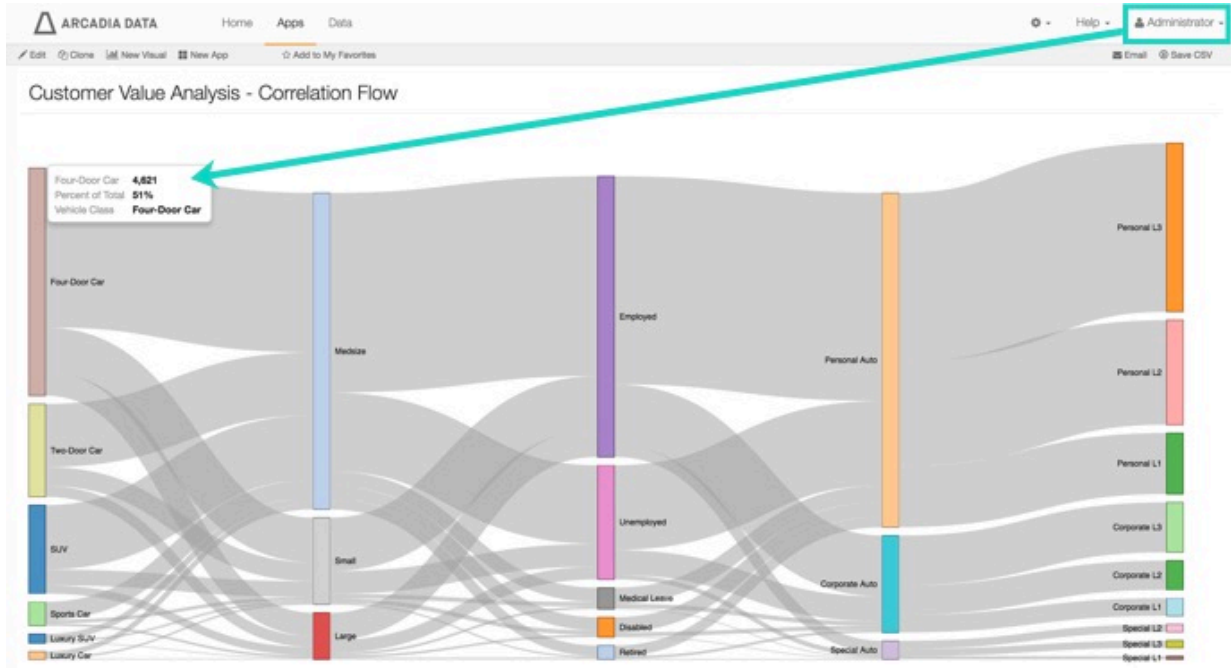
Verifying access restriction on a visual

About this task

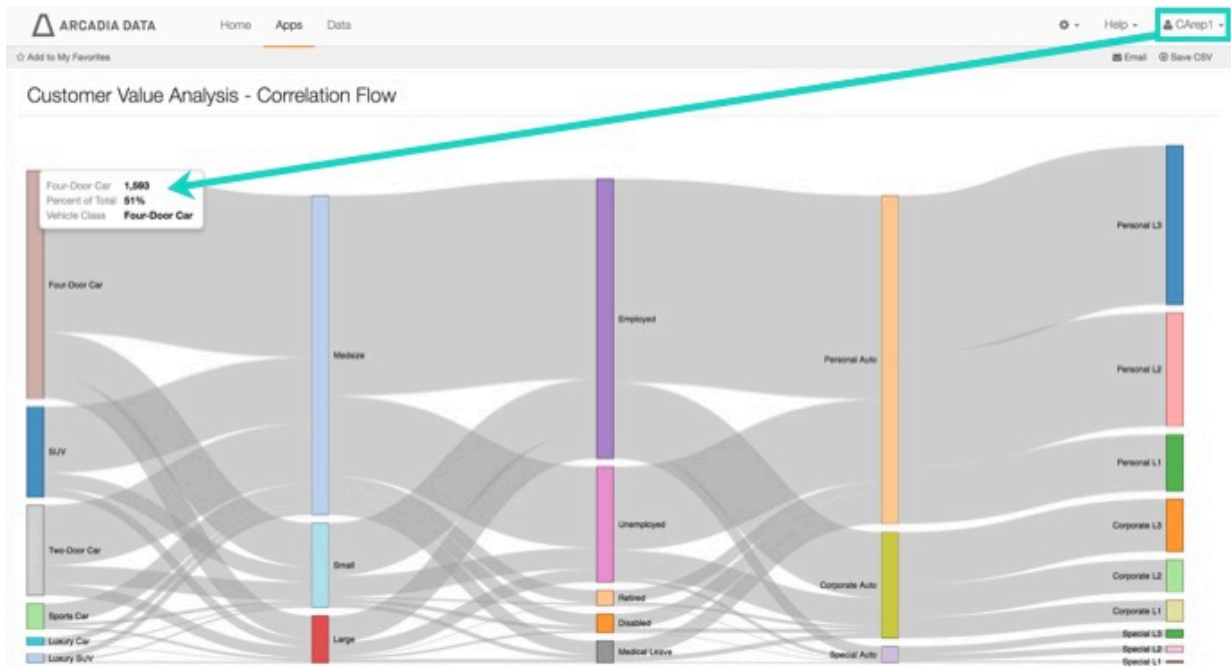
To ensure that we specified the access restrictions correctly, let us view the same visual as an Administrative user, and as a user who is linked to each of the three filter associations declared in the previous section.

Procedure

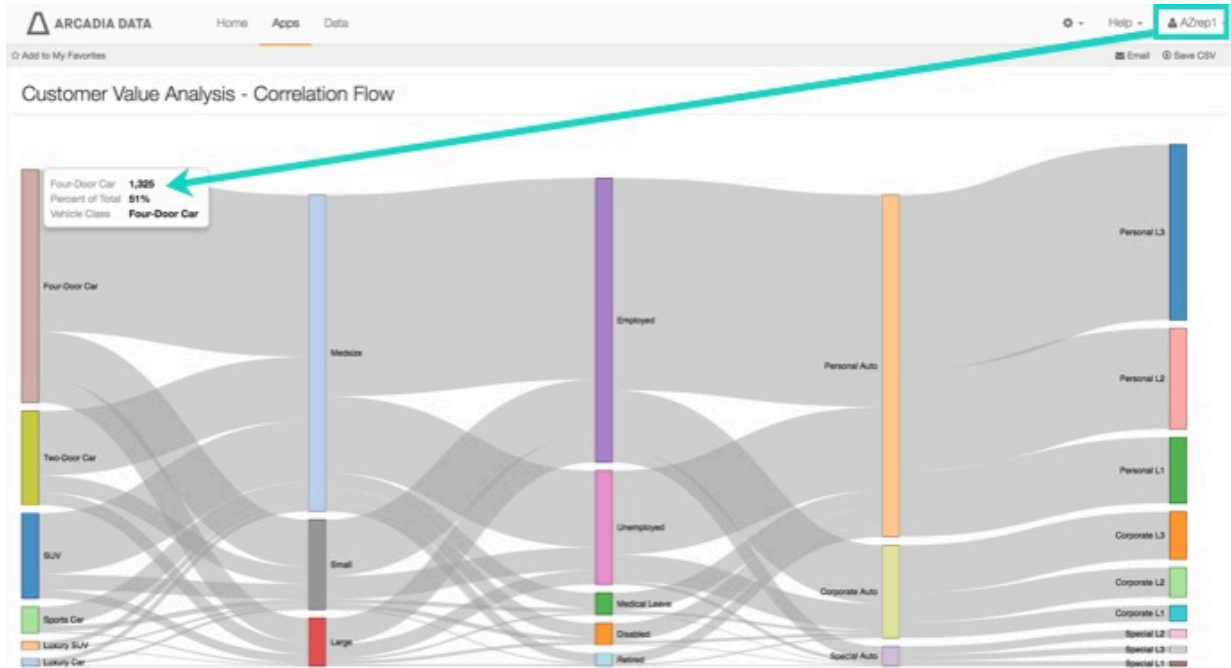
1. Log in as a user with Administrative privileges, and navigate to the application. Notice that the entire dataset appears in the visual; for example, it shows 4,621 Four-Door Cars.



2. Log in as a user associated with the dataset through the CA SalesReps filter association. Such a user, in this case CRep1, can only see records available for the state of California. For example, when you navigate to the application, you can only see 1,593 records for Four-Door Cars.



- If you log in as AZrep1, a user associated with the dataset through the Mountain SalesReps filter association, you could only see records available for the states of Arizona and Nevada. For example, when you login as AZrep1 and navigate to the application, you can see only 1,325 records for Four-Door Cars.



- Finally, if you log in as WArepl, a user associated with the dataset through the North West SalesReps filter association, you would see records available for the states of Oregon and Washington, but none of the others. For example, when you login as WArepl and navigate to the application, you see 1,703 records for Four-Door Cars.

