

Working with User Roles

Date published: 2020-10-30

Date modified: 2022-09-21

CLOUDBERA

Legal Notice

© Cloudera Inc. 2024. All rights reserved.

The documentation is and contains Cloudera proprietary information protected by copyright and other intellectual property rights. No license under copyright or any other intellectual property right is granted herein.

Unless otherwise noted, scripts and sample code are licensed under the Apache License, Version 2.0.

Copyright information for Cloudera software may be found within the documentation accompanying each component in a particular release.

Cloudera software includes software from various open source or other third party projects, and may be released under the Apache Software License 2.0 (“ASLv2”), the Affero General Public License version 3 (AGPLv3), or other license terms. Other software included may be released under the terms of alternative open source licenses. Please review the license and notice files accompanying the software for additional licensing information.

Please visit the Cloudera software product page for more information on Cloudera software. For more information on Cloudera support services, please visit either the Support or Sales page. Feel free to contact us directly to discuss your specific needs.

Cloudera reserves the right to change any products at any time, and without notice. Cloudera assumes no responsibility nor liability arising from the use of products, except as expressly agreed to in writing by Cloudera.

Cloudera, Cloudera Altus, HUE, Impala, Cloudera Impala, and other Cloudera marks are registered or unregistered trademarks in the United States and other countries. All other trademarks are the property of their respective owners.

Disclaimer: EXCEPT AS EXPRESSLY PROVIDED IN A WRITTEN AGREEMENT WITH CLOUDERA, CLOUDERA DOES NOT MAKE NOR GIVE ANY REPRESENTATION, WARRANTY, NOR COVENANT OF ANY KIND, WHETHER EXPRESS OR IMPLIED, IN CONNECTION WITH CLOUDERA TECHNOLOGY OR RELATED SUPPORT PROVIDED IN CONNECTION THEREWITH. CLOUDERA DOES NOT WARRANT THAT CLOUDERA PRODUCTS NOR SOFTWARE WILL OPERATE UNINTERRUPTED NOR THAT IT WILL BE FREE FROM DEFECTS NOR ERRORS, THAT IT WILL PROTECT YOUR DATA FROM LOSS, CORRUPTION NOR UNAVAILABILITY, NOR THAT IT WILL MEET ALL OF CUSTOMER’S BUSINESS REQUIREMENTS. WITHOUT LIMITING THE FOREGOING, AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, CLOUDERA EXPRESSLY DISCLAIMS ANY AND ALL IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY, QUALITY, NON-INFRINGEMENT, TITLE, AND FITNESS FOR A PARTICULAR PURPOSE AND ANY REPRESENTATION, WARRANTY, OR COVENANT BASED ON COURSE OF DEALING OR USAGE IN TRADE.

Contents

Creating new roles.....	4
Adding privileges.....	6
Setting system privileges.....	7
Setting role privileges.....	8
Setting connection privileges.....	12
Setting dataset privileges.....	16
Editing role assignments.....	19
Assigning roles to users.....	20
Assigning roles to user groups.....	26
Assigning multiple roles to multiple users.....	31
Deleting roles.....	34

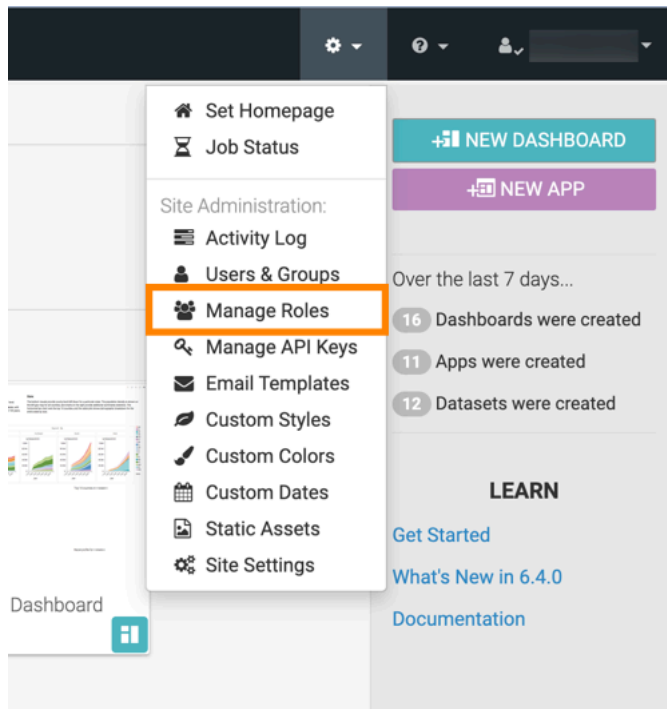
Creating new roles

About this task

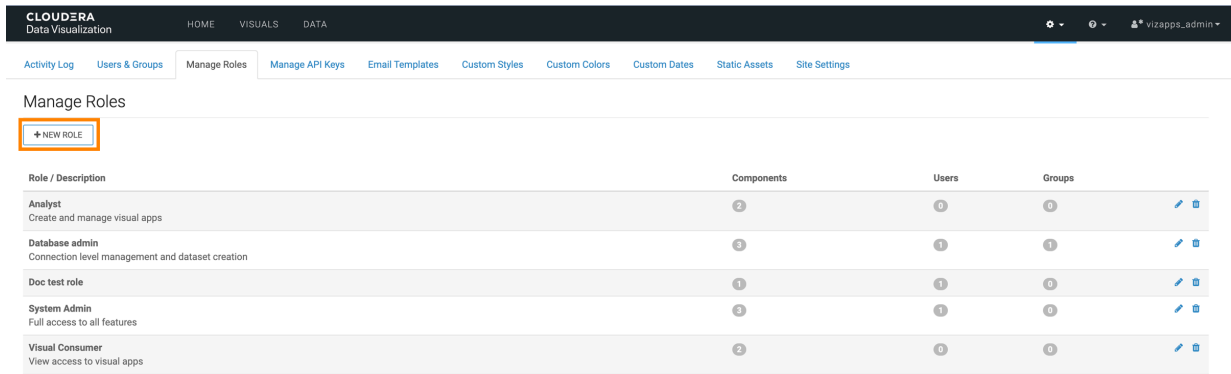
Admin users with Manage roles and users privilege can create new roles for Role Based Access Control (RBAC). The following steps demonstrate how to create a new role.

Procedure

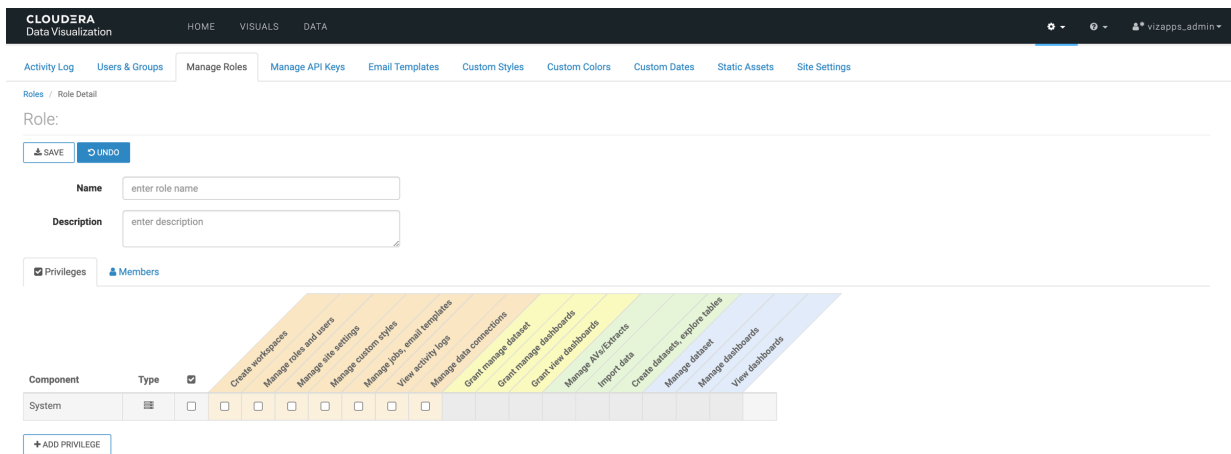
1. On the main navigation bar, click the (gear) icon.
2. In the drop-down menu, click Manage Roles.



3. Click NEW ROLE.

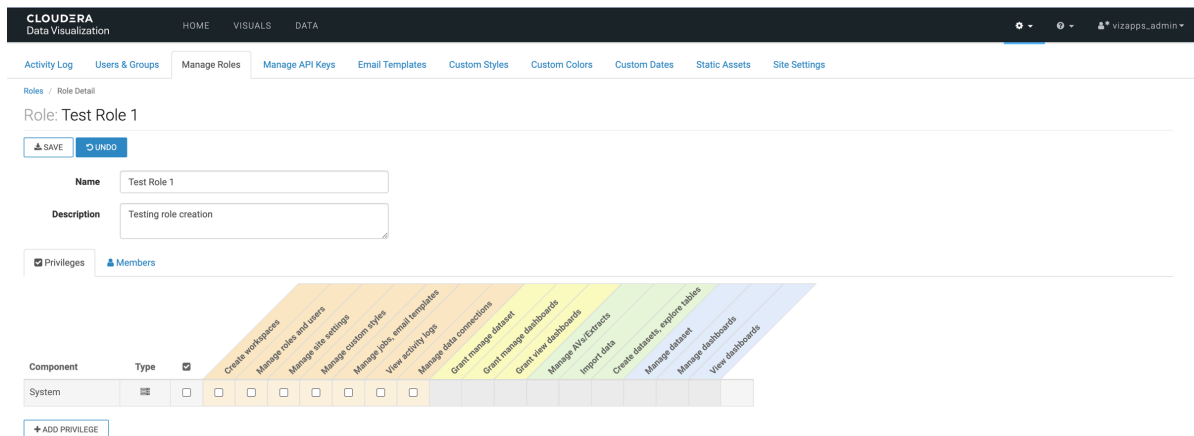


The Role definition interface appears, open on the Privileges tab.

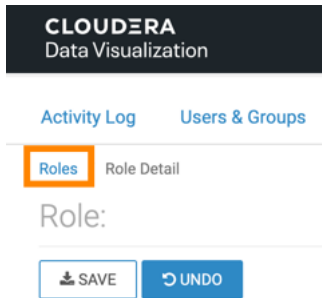


4. Name and save the new role.

- a) In the Name field, enter the name of the new role.
In this example, Test Role 1 is used.
- b) In the Description field, enter a brief purpose for the new role.
- c) Click SAVE.



- To check that the role exists, click Roles at the top of the menu.



You can see that the new role is in the list of roles.

 A screenshot of the Cloudera Data Visualization 'Manage Roles' page. The page has a dark header with 'CLUSTER' and 'Data Visualization' on the left, and 'HOME VISUALS DATA' on the right. Below the header is a navigation bar with 'Activity Log', 'Users & Groups', 'Manage Roles', 'Manage API Keys', 'Email Templates', 'Custom Styles', 'Custom Colors', 'Custom Dates', 'Static Assets', and 'Site Settings'. The main content area is titled 'Manage Roles' and has a '+ NEW ROLE' button. Below this is a table with the following columns: 'Role / Description', 'Components', 'Users', and 'Groups'. The table contains several rows, with 'Test Role 1' highlighted by an orange box.

Role / Description	Components	Users	Groups
Analyst Create and manage visual apps	2	0	0
Database admin Connection level management and dataset creation	3	1	1
Doc test role	1	1	0
System Admin Full access to all features	3	1	0
Test Role 1 Testing role creation	1	0	0
Visual Consumer View access to visual apps	2	0	0

What to do next

Continue by defining *Role privileges* and *Editing role assignments* for the new role.

Related Information

[Editing role assignments](#)

[Role privileges](#)

Adding privileges

After you declare a new role in the Role Based Access Control (RBAC) system of Data Visualization, you can start adding the various privileges.

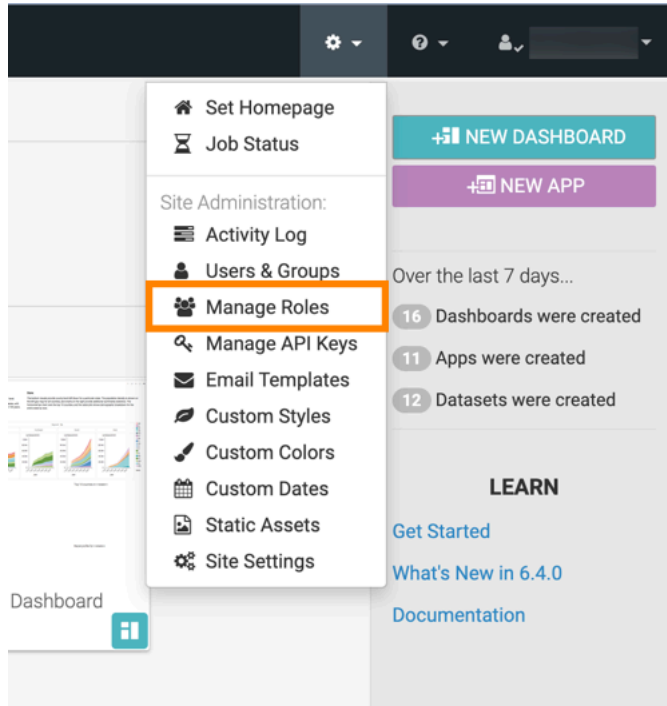
About this task

The following steps demonstrate how to add or change privileges defined for a specific role. In this example, Test Role 1 is used, which was previously defined in *Creating new roles*:

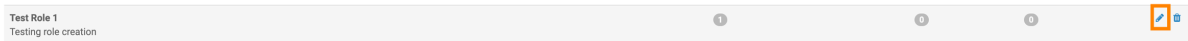
Procedure

- On the main navigation bar, click the (gear) icon.

- In the drop-down menu, click Manage Roles.



- In the Roles interface, next to the role to edit, click the Edit(pencil/edit) icon.



- On the Role definition interface, you can set the following groups privileges:
 - Setting system privileges
 - Setting role privileges
 - Setting connection privileges
 - Setting dataset privileges
- Click SAVE to preserve the new privilege assignments.

Related Information

[Creating new roles](#)

[Setting system privileges](#)

[Setting role privileges](#)

[Setting connection privileges](#)

[Setting dataset privileges](#)

Setting system privileges

System-level privileges are key components of the Role Based Access Control (RBAC) system in Data Visualization.

About this task



Note:

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

The following steps demonstrate how to add system privileges to a role. In this example, Test Role 1 is used.

Procedure

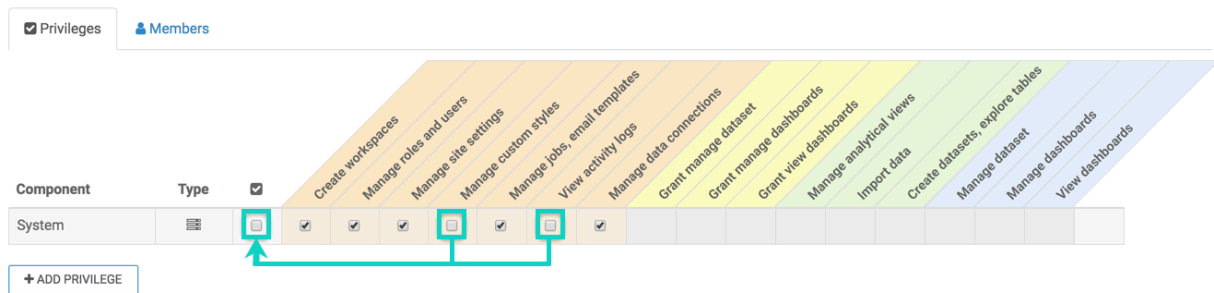
1. On the System component line, click the Select all checkbox, the one closest the name of the System category name.

This activates the next four checkboxes, granting the permissions for the following actions:

- Create workspaces
- Manage roles and users
- Manage site settings
- Manage custom styles
- Manage jobs, email templates
- View activity logs
- Manage data connections



To grant only some of these System permission, de-select the ones not permitted by the new role.



2. Click SAVE at the top of the interface to save the changes to the role.

What to do next

Proceed to *Setting role privileges*.

Related Information

[Setting role privileges](#)

[RBAC permissions](#)

Setting role privileges

Role privileges are separate components of the Role Based Access Control (RBAC) system in Data Visualization. They define the level of dataset access that a role is allowed to grant to the members of a specified role.

About this task



Note:

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

The following steps demonstrate how to add role privileges to a role. In this example, Test Role 1 is used.

Procedure

1. Add another privilege by clicking the ADD PRIVILEGE button.

The screenshot shows the 'Privileges' management interface. At the top, there are tabs for 'Privileges' (selected) and 'Members'. Below the tabs is a table with columns for 'Component', 'Type', and a series of privilege categories. The 'System' component is selected. Below the table, there is an 'ADD PRIVILEGE' button.

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 analytical views	Import data	Create datasets, explore tables	Manage dataset	Manage dashboards	View dashboards
System		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>									

Below the table, there is an 'ADD PRIVILEGE' button.

2. The ADD PRIVILEGE modal window appears.

The screenshot shows the 'Add Privilege' modal window. It has a title bar with a close button (X). The main content area contains a 'Component Type' dropdown menu set to 'Connection'. Below it is a search field labeled 'Connection(s) *' with the text 'select connection(s)...'. At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

You can see that the default privilege type is at the Connection level, but it can be changed by selecting Role or Dataset from the list of Component Types.

3. In the Add Privilege modal window, under Component Type, select Role.

- From Roles(s), select either Visual Consumer, a role that was defined earlier.
You can repeat this step to add more roles to this privilege.

Add Privilege ✕

Component Type

Roles(s) *

- After selecting the appropriate roles, click CREATE.

Add Privilege ✕

Component Type Role

Roles(s) * Visual Consumer ✕

CANCEL
CREATE

The Role privilege for the Visual Consumer role appears on the list of privileges.

By default, it contains all possible privileges for a role component:

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

☑ 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 manage dashboards	Grant view dashboards	Manage analytical views	Import data	Create datasets, explore tables	Manage dataset	Manage dashboards	View dashboards	
System		<input type="checkbox"/>	☑	☑	☑	☐	☑	☐	☑										
Visual Consumer		<input checked="" type="checkbox"/> 1							☑	☑ 3	☑ 2								

+ ADD PRIVILEGE

Note the following:

- The privilege type appears with the Roles icon.
- The Grant view dashboards permission is mandatory if the other permissions exist, and cannot be removed. If you uncheck both Grant manage dashboards and Grant manage dataset, then the Grant view dashboards permission becomes mutable and can be unselected.
- The Grant manage dashboards permission is mandatory if Grant manage dataset permission is, and cannot be removed. If you uncheck Grant manage dataset, it becomes mutable and can be unselected.
- This privilege may be deleted by clicking the Delete icon.

6. For the role permission on Visual Consumer, select only the Grant view dashboards permission.

The screenshot shows the 'Privileges' tab with a table of permissions. The 'Visual Consumer' row has a checkmark in the 'Grant view dashboards' column.

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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>										
Visual Consumer		<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>

7. Repeat the previous steps twice, creating the following privileges:

- On role Analyst, specify the Grant manage dashboards and Grant view dashboards permissions.
- On role Data Admin, specify all permissions: Grant manage dataset, Grant manage dashboards, and Grant view dashboards.

The screenshot shows the 'Privileges' tab with a table of permissions. The 'Analyst' row has checkmarks in 'Grant manage dashboards' and 'Grant view dashboards'. The 'Data Admin' row has checkmarks in 'Grant manage dataset', 'Grant manage dashboards', and 'Grant view dashboards'.

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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>										
Visual Consumer		<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>
Analyst		<input type="checkbox"/>								<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>
Data Admin		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>

8. Click SAVE at the top of the interface to save the updates.

Results

- The members that get this role, defined under the Members tab, can grant dataset access defined by the role-based privilege rows.
- The selections in the rows indicate the level of privileges that each role, as defined on the Component line, receives. For example, Analysts can grant Manage and View privileges to users.
- The dataset access permissions are granted to the roles defined on the component line.

Proceed to *Setting connection privileges*.

Related Information

[Setting connection privileges](#)

[RBAC permissions](#)

Setting connection privileges

Connection privileges are separate components of the Role Based Access Control (RBAC) system in Data Visualization. Depending on the parameters of the business case, they may be specified identically (and at the same time) for a number of connections, or set separately for each connection.

About this task

The following steps demonstrate how to add connection-level privileges to a role. In this example Test Role 1 is used.

Procedure

1. Add another privilege by clicking the ADD PRIVILEGE button.

The screenshot shows a table with columns for Component, Type, and a grid of checkboxes for various privileges. The 'Data Admin' role has several privileges checked, including 'Grant manage connections', 'Grant manage dataset', and 'Grant view dashboards'. Below the table, the '+ ADD PRIVILEGE' button is highlighted.

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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>										
Visual Consumer		<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>
Analyst		<input type="checkbox"/>								<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>
Data Admin		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							<input type="checkbox"/>

The Add Privilege modal window appears.

The 'Add Privilege' modal window is shown. The 'Component Type' dropdown is set to 'Connection'. The 'Connection(s)' field is empty with a placeholder 'select connection(s)...'. There are 'CANCEL' and 'CREATE' buttons at the bottom right.

You can see that the default privilege type is at the Connection level, but it can be changed by selecting either Role or Dataset from the list of Component Types. In this example, Connection level access is defined.

- From Connection(s), select either All connections or one of the individual connections.

In this example, access to the samples connection is selected.

Add Privilege ✕

Component Type Connection ▼

🔗 Connection(s) *

- All connections
- Arcadia Enterprise
- samples**

You can repeat the previous step to add more connections to this privilege.

3. Click CREATE.

Add Privilege ✕

Component Type Connection ▾

Connection(s) * samples ✕

CANCEL CREATE

The connection privilege for the samples connection appears on the list of privileges for the role.

By default, all possible privileges for a connection component are selected:

- Manage analytical views
- Import data
- Create datasets, explore tables

Privileges Members

Component	Type	<input checked="" type="checkbox"/>	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	View dashboards
System		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>									
Visual Consumer		<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>						
Analyst		<input type="checkbox"/>								<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Data Admin		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
samples		<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

+ ADD PRIVILEGE

Note the following:

- The privilege type appears with the Connection icon.
- Manage analytical views and Import data are independent of one another, and they include the Create datasets, explore tables permission. If you uncheck both of these 'greater' permissions, Create datasets, explore tables becomes mutable, and can be unselected. But then you will no longer have any connection-level access components.
- This privilege may be deleted by clicking the Delete icon.

**Note:**

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

4. Click SAVE at the top of the interface to save the latest changes to the role definition.

What to do next

Proceed to *Setting dataset privileges*.

Related Information

[Setting dataset privileges](#)

[RBAC permissions](#)

Setting dataset privileges

Dataset privileges are separate components of the Role Based Access Control (RBAC) system in Data Visualization. Depending on the parameters of the business case, they may be specified identically (and at the same time) for a number of datasets, or set separately for each dataset.

About this task

The following steps demonstrate how to add dataset-level privileges to a role. In this example, Test Role 1 is used.

Procedure

1. Add another privilege by clicking the ADD PRIVILEGE button.
2. In the Add Privilege modal window, from Component Type, select Dataset.

The screenshot shows a modal window titled "Add Privilege" with a close button (X) in the top right corner. The "Component Type" field is a dropdown menu that is currently open, displaying a list of options: "Connection", "Role", "Connection", and "Dataset". The "Dataset" option is highlighted with a blue background. To the left of the dropdown, there is a label "Component Type" and a link icon followed by "Connection(s) *". At the bottom right of the modal, there are two buttons: "CANCEL" and "CREATE".

- From Connection(s), select either All connections or one of the individual connections.

In this example, access to the samples connection is selected.

Add Privilege ✕

Component Type Dataset

Connection * select dataset connection...

Dataset(s) *

- All connections
- Arcadia Enterprise
- samples**

CANCEL **CREATE**

4. From Datasets(s), select either All datasets or one of the individual connections.

To select additional datasets, repeat this step.

In this example, access to the Cereals, Iris, and World Life Expectancy datasets is selected. Notice that the datasets include the dataset ID.

Add Privilege ✕

Component Type Dataset ▾

Connection * samples ▾

Dataset(s) * Cereals (ID: 9) ✕ Iris (ID: 3) ✕
World Life Expectancy (ID: 8) ✕

CANCEL
CREATE

The dataset privilege for the Iris, Cereals, and World Life Expectancy datasets appears on the list of privileges for the role.

By default, it contains all possible privileges for a dataset component:

- Manage dataset
- Manage dashboards
- View dashboards

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 analytical views	Import data	Create datasets, explore tables	Manage dataset	Manage dashboards	View dashboards
System		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>								
Visual Consumer		<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Analyst		<input type="checkbox"/>								<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Data Admin		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
samples		<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
samples / Cereals, Iris, World Life Expectancy	1	<input checked="" type="checkbox"/>												<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 3	

+ ADD PRIVILEGE

Note the following:

- a. The Dataset icon specifies the type.

- b. Two of the permissions, Manage dashboards and View dashboards are mandatory if the privilege contains the manage dataset permission, and cannot be removed. The checkboxes in these columns are filled in and fixed.
 - If you unselect Manage dataset, then the Manage dashboards becomes mutable, and can be unselected.
 - If you uncheck Manage dashboards, View dashboards becomes mutable, and can be unselected.
- c. You can delete this privilege by clicking the Delete icon.

**Note:**

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

5. Click SAVE at the top of the interface to save the changes to the role.

Results

The role definition for Test Role 1 is now complete. Note that it has 6 distinct components.

Roles

+ NEW ROLE

Role / Description	Components	Users	Groups	
Analyst	1	0	0	
Data Admin	1	0	0	
Test Role 1 Testing role creation	6	0	0	
Visual Consumer	1	0	0	

Related Information

[RBAC permissions](#)

Editing role assignments

About this task

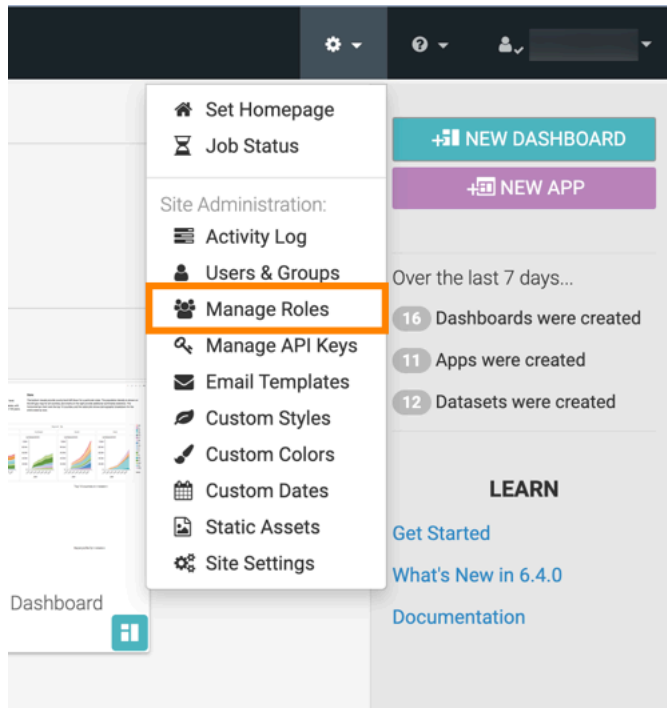
The following steps demonstrate how to edit role assignments for a specific role.

In this example, Test Role 1 is used, which was previously defined in *Creating new roles*.

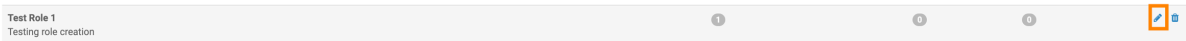
Procedure

1. On the main navigation bar, click the (gear) icon.

- In the drop-down menu, click Manage Roles.



- In the Roles interface, next to the role to edit, click the Pencil icon.



Note: If you do not have any roles defined, see the instructions in *Creating new roles*.

- On the Role definition interface, click Edit.
- Click the Members tab and proceed to edit member roles through one of the following procedures:
 - Assigning roles to a single user
 - Assigning roles to user groups
 - Assigning multiple roles to multiple users

Related Information

[Creating new roles](#)

[Assigning roles to a single user](#)

[Assigning roles to user groups](#)

[Assigning multiple roles to multiple users](#)

Assigning roles to users

About this task

In this article, we demonstrate how to add users to a role. We are using an existing role Test Role 1.

To assign users to existing roles, follow these steps:

Procedure

1. Under the Members tab, in the Users list, click Edit User(s)

Role Assignment ✕

Members

🔍

Available to select

- Select All
- Administrator
- ArcadiaAdmin
- ArcadiaUser
- CArep1
- CArep2
- NVrep1
- NormalUser
- ORrep1

ADD >>

<<

Selected

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

+ ADD

CANCELAPPLY

The Role Assignment modal window for users appears.

Role Assignment



Members

Available to select

- Select All
- Administrator
- ArcadiaAdmin
- ArcadiaUser
- CArep1
- CArep2
- NVrep1
- NormalUser
- ORrep1

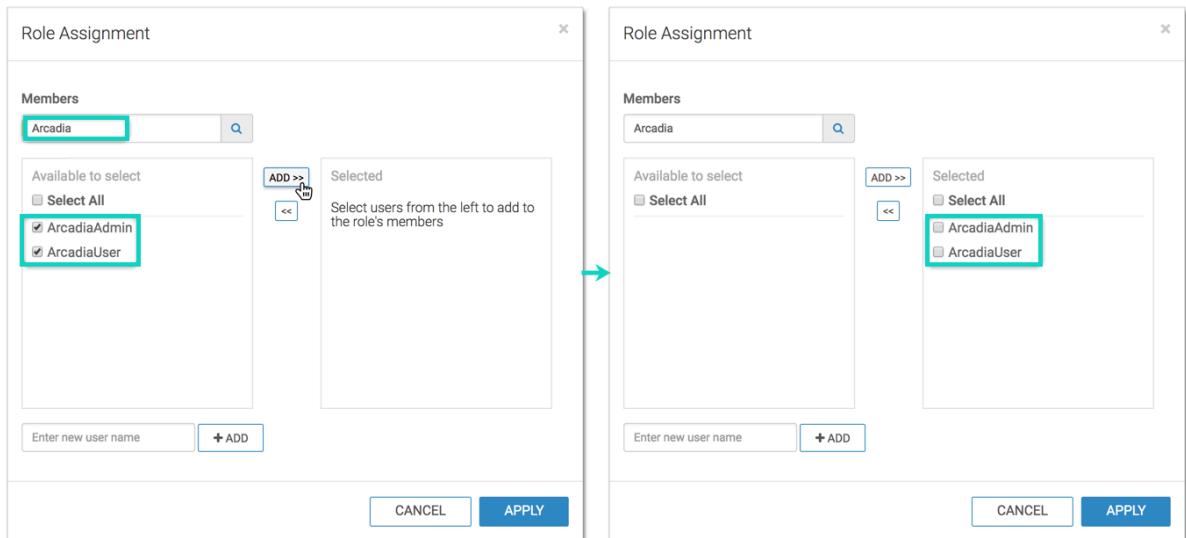
Selected

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

2. There are several options for adding a user to a membership:

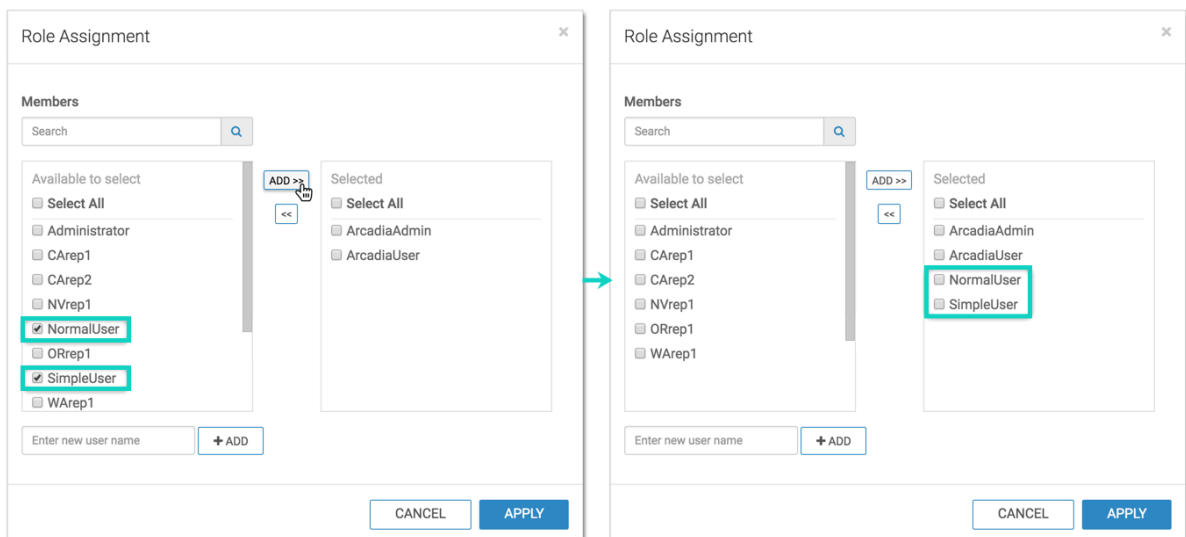
- Search

If you have a long list of users in the Members section, use the Search box to match user names, select them from the sub-list, and then click Add to move them to the right side of the modal window. Click Apply.



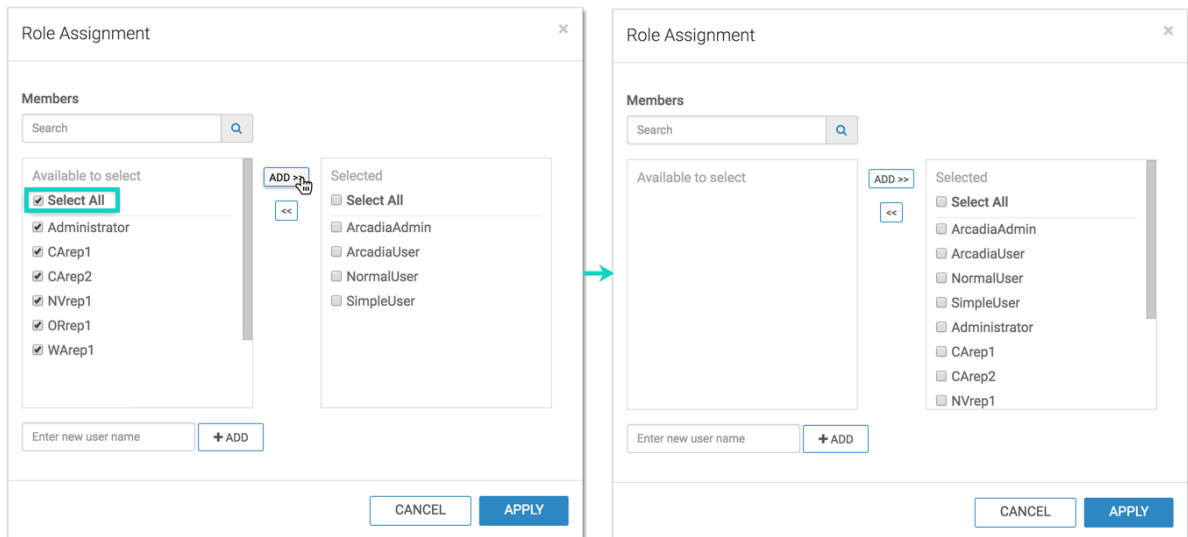
- Select

In the Members section, select the users to assign to the role and click Add to move them to the right side of the modal window. Click Apply.



- Select All

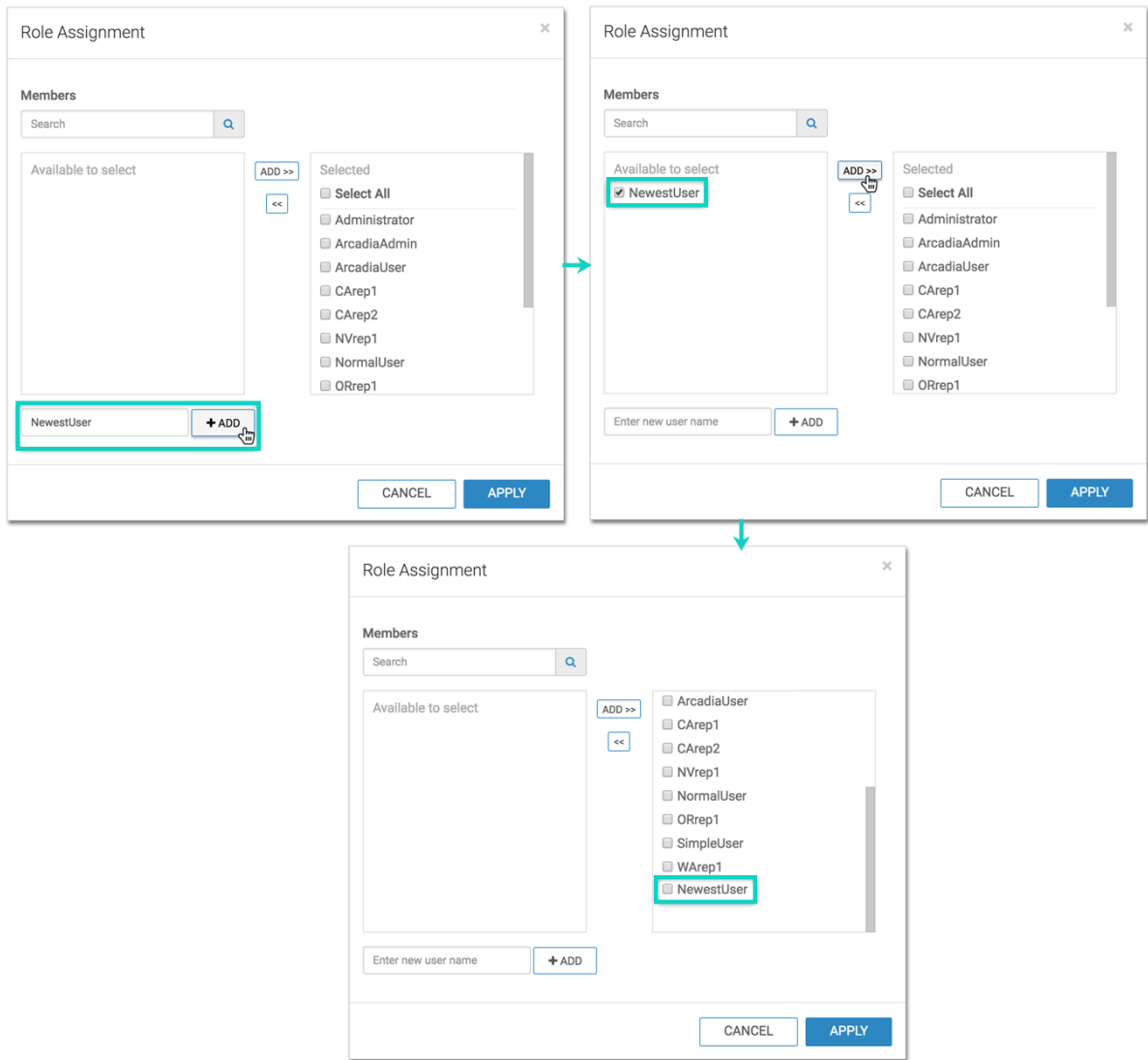
To assign all users to Members, select All to get all user names, and then click Add to move them to the right side of the modal window. Click Apply.



- Adding Externally Defined Users; LDAP Authentication

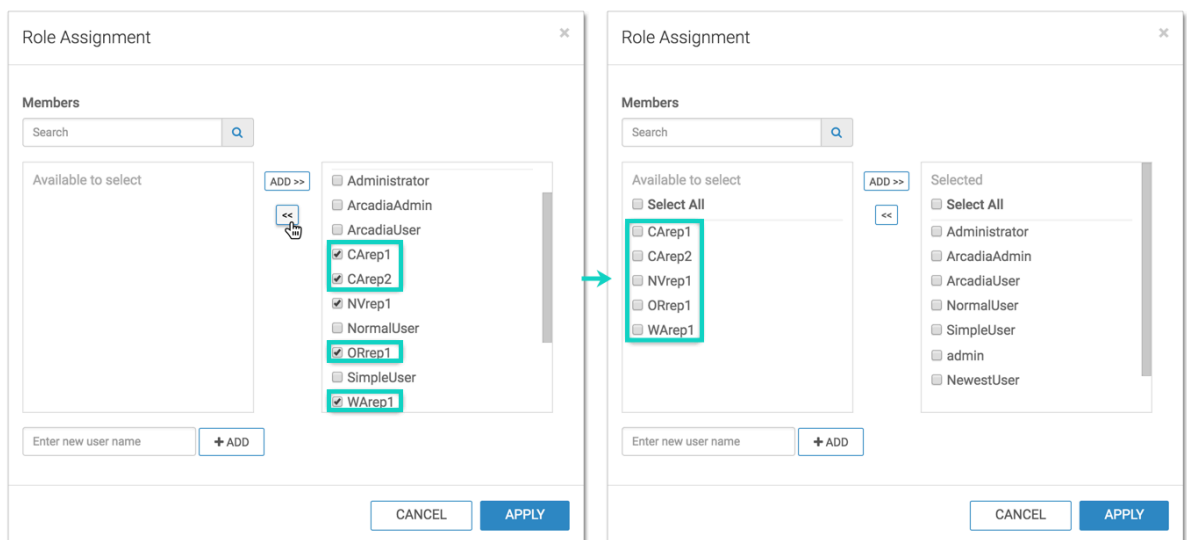
For convenience, the Role Assignment interface supports adding into the list of assignees usernames that are not stored locally. For example, known usernames available through LDAP authentication may be added in this manner.

Enter the new user name, and click Add. After the new user name appears in the Members section, select it and click Add to move the new user to the right side of the modal window. Click Apply.



- Remove

To move users out of Members, select the user(s) on the right side panel, and then click . Click Apply.



The list of users assigned to the role appears in the Role: Test Role 1 interface, under the Members tab.

3. Click Save. A confirmation of role update appears briefly on the screen.

The screenshot shows the Arcadia Data interface for editing a role. The header includes the Arcadia Data logo and navigation links for HOME, VISUALS, and DATA. The user is logged in as Administrator. The page title is 'Roles / Role Detail' and the specific role is 'Role: Test Role 1'. There are 'SAVE' and 'UNDO' buttons at the top. The 'Name' field contains 'Test Role 1' and the 'Description' field contains 'Testing role creation'. Below these fields are two tabs: 'Privileges' (checked) and 'Members'. The 'Members' tab is active, showing a list of users and a section for groups. The 'Users' section has a count of 7 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. The user list includes: NewestUser, Administrator, ArcadiaAdmin, ArcadiaUser, NormalUser, SimpleUser, and admin. A note below the list states: '(these users were explicitly added and are not necessarily part of the added groups)'. The 'Group Name' section is currently empty.

Assigning roles to user groups

About this task

In this article, we demonstrate how to add user groups to a role. We are using an existing role Administrators Only.

To assign user groups to existing roles, follow these steps:

Procedure

1. Under the Members tab, in the Users list, click Edit User(s).

Privileges Members

Users 0

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

Groups 0 Require all groups

Group Name

The Role Assignment modal window for groups appears.

Role Assignment

Members

Search

Available to select

- Select All
- Administrators
- Arcadians
- Everyone
- Group One
- SalesReps

Selected

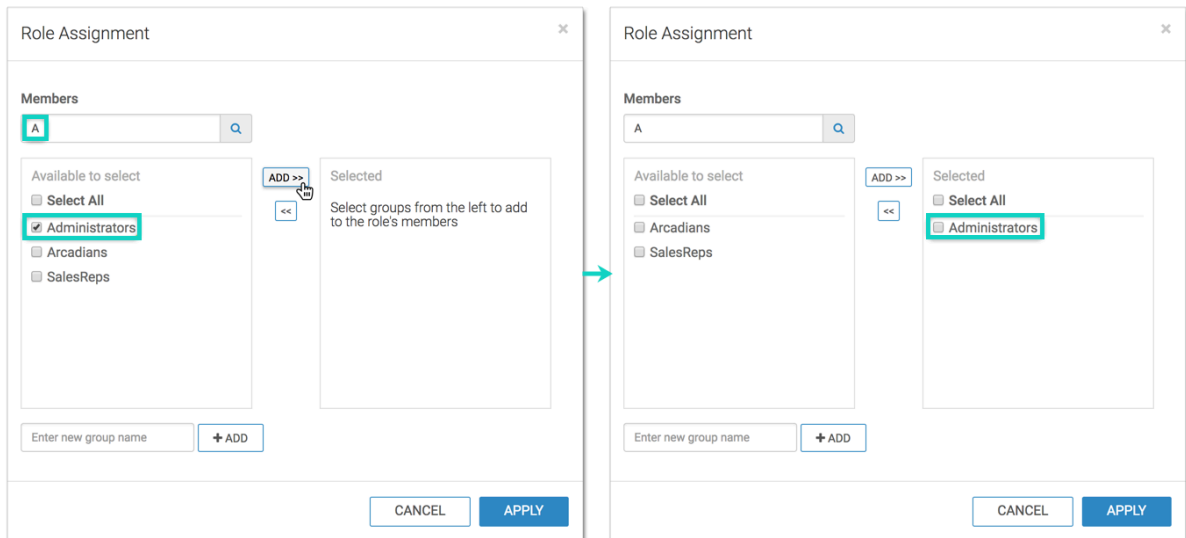
Select groups from the left to add to the role's members

Enter new group name

2. There are several options for adding groups to role membership:

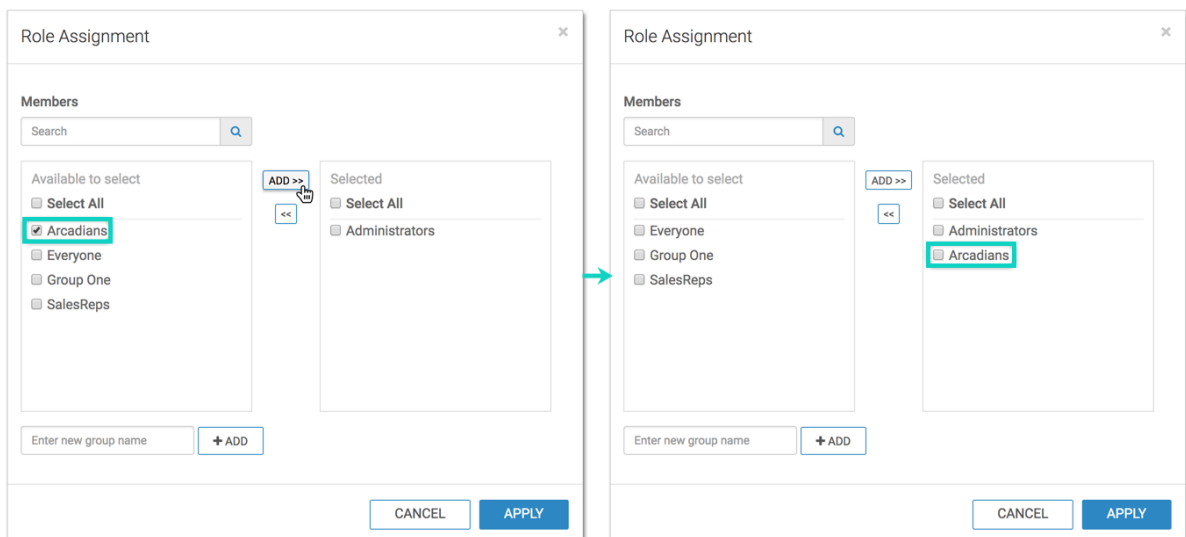
- Search

If you have a long list of groups in the Members section, use the Search box to match group names, select them from the sub-list, and then click Add to move them to the right side of the modal window. Click Apply.



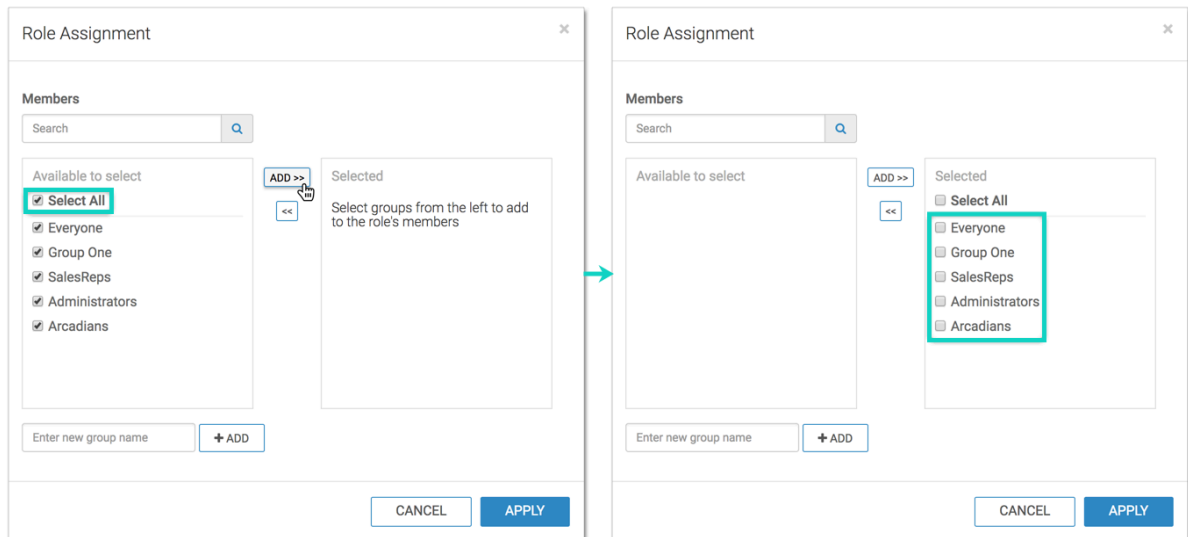
- Select

In the Members section, select the groups to assign to the role and click Add to move them to the right side of the modal window. Click Apply.



- Select All

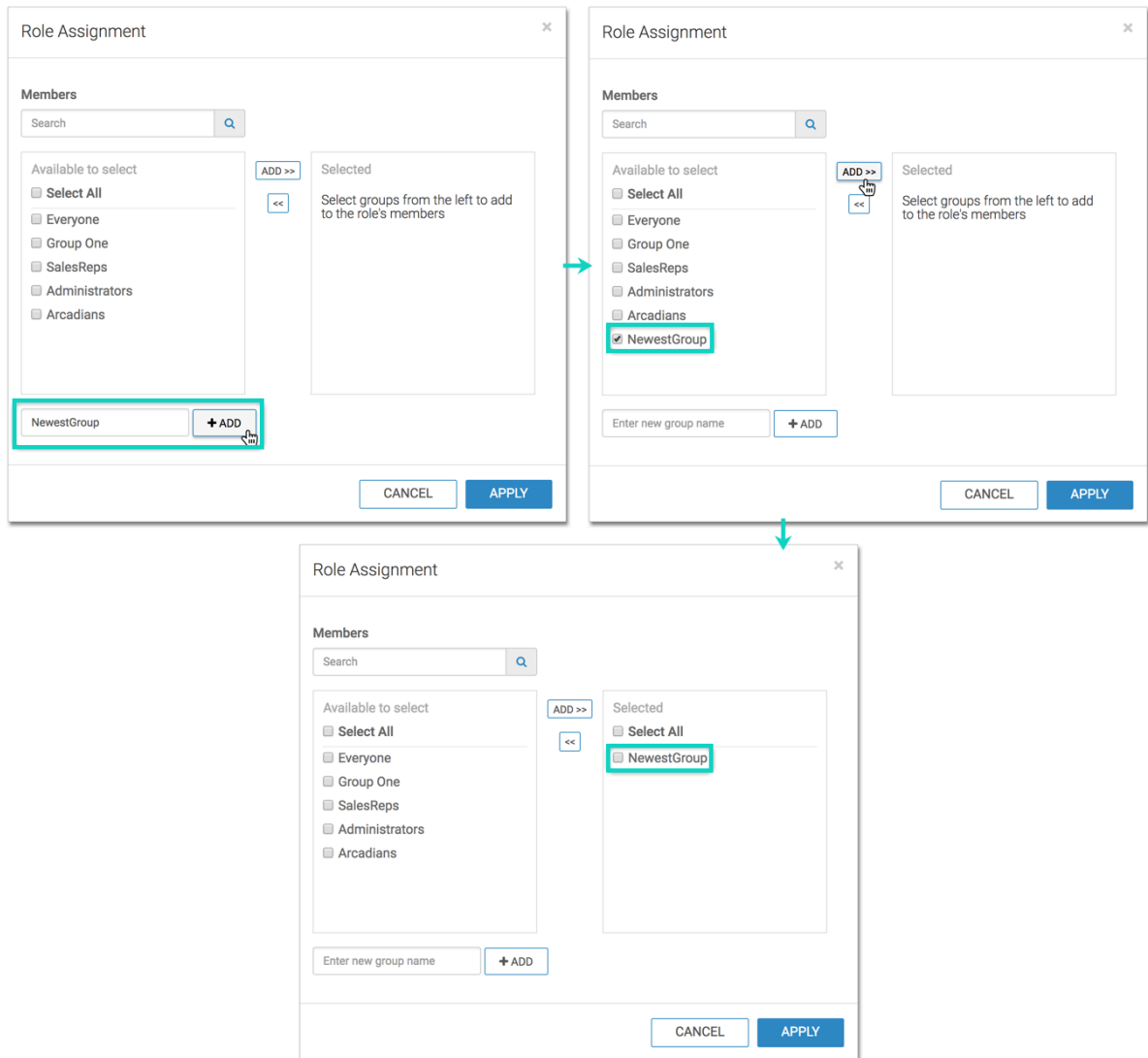
To assign all groups to Members, select All to get all group names, and then click Add to move them to the right side of the modal window. Click Apply.



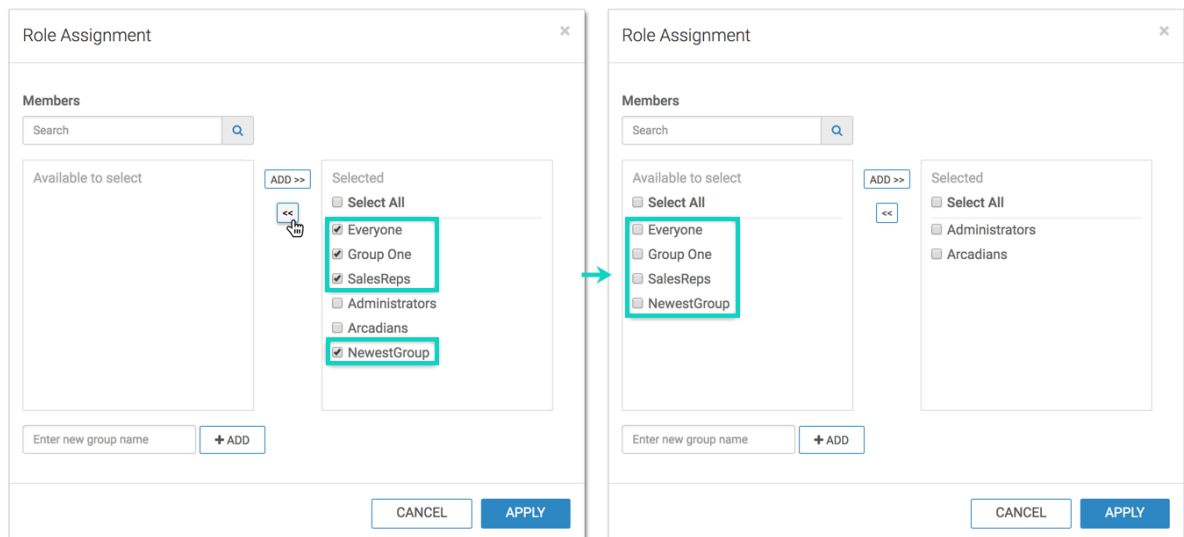
- Adding Externally Defined Users; LDAP Authentication

For convenience, the Role Assignment interface supports adding into the list of assignees user groups that are not stored locally. For example, known groups available through LDAP authentication may be added in this manner.

Enter the new group name, and click Add. After the new group name appears in the Members section, select it and click Add to move the new group to the right side of the modal window. Click Apply.



- Remove



The list of groups assigned to the role appears in the Role: Administrators Only interface, under the Members tab.

- Click Save. A confirmation of role update appears briefly on the screen.

The screenshot shows the Arcadia Data interface for editing a role. The breadcrumb is 'Roles / Role Detail'. The role name is 'Administrators Only'. There are 'SAVE' and 'UNDO' buttons at the top. The 'Name' field contains 'Administrators Only' and the 'Description' field contains 'Full Administrator Privileges over all domains'. Below the form are tabs for 'Privileges' (checked) and 'Members'. Under the 'Members' tab, there are two sections: 'Users' (0) and 'Groups' (2). The 'Users' section has an 'EDIT USER(S)' button and a table with columns 'Username', 'First Name', and 'Last Name'. A note below the table states '(these users were explicitly added and are not necessarily part of the added groups)'. The 'Groups' section has a 'Require all groups' checkbox (unchecked) and an 'EDIT GROUP(S)' button. Below it is a table with 'Group Name' and two entries: 'Administrators' and 'Arcadians'.

Assigning multiple roles to multiple users

About this task

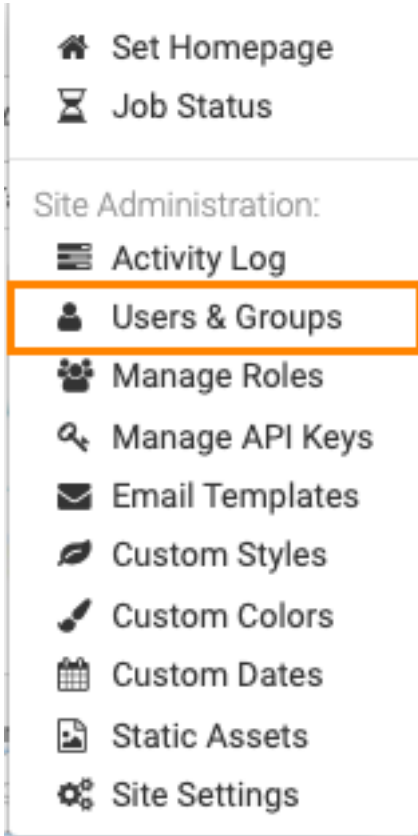
In this article, we demonstrate how to add multiple users to multiple roles in the Users interface. We are using existing roles Test Role 1 and View Only.

To assign multiple users to existing roles, follow these steps:

Procedure

- On the main navigation bar, click, the Gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. Select the users that you want to assign to roles. We used CArep1, CArep2, NVrep1, ORrep1, and WArepl.

The screenshot shows the 'Manage Users & Groups' interface. At the top, there are navigation tabs: 'Activity Log', 'Users & Groups' (selected), 'Manage Roles', 'Manage API Keys', 'Email Templates', 'Custom Styles', 'Custom Colors', 'Custom Dates', 'Static Assets', and 'Site Settings'. Below the tabs, there are buttons for 'NEW USER' and 'NEW GROUP'. A summary shows 'Users 11' and 'Groups 4'. There are also buttons for '+ ADD TO GROUP', '+ ADD TO ROLES', and 'DELETE'. The main part of the interface is a table with the following columns: Username, Permissions, Date Joined, Last Login, Member of Group(s), Roles, and Status. The table contains 11 entries, with the following rows selected (indicated by a checkmark in the first column):

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A
CArep1	Normal	a year ago	a year ago	SalesReps		A
CArep2	Normal	a year ago	a year ago	SalesReps		A
NormalUser	Normal	2 months ago	2 months ago		Test Role 1	I
NVrep1	Normal	a year ago	a year ago	SalesReps		A
ORrep1	Normal	a year ago	a year ago	SalesReps		A
SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A
WArepl	Normal	a year ago	a year ago	SalesReps		A

Showing 1 to 11 of 11 entries

4. Click Add to Roles.

The screenshot shows the 'Manage Users & Groups' interface. At the top, there are navigation tabs: Activity Log, Users & Groups (selected), Manage Roles, Manage API Keys, Email Templates, Custom Styles, Custom Colors, Custom Dates, Static Assets, and Site Settings. Below the tabs, there are buttons for 'NEW USER' and 'NEW GROUP'. Underneath, there are buttons for '+ ADD TO GROUP', '+ ADD TO ROLES' (which is highlighted with a red box and has a dropdown arrow), and 'DELETE'. Below these buttons is a table with the following columns: Username, Permissions, Date Joined, Last Login, Member of Group(s), Roles, and Status. The table contains 11 entries. Several rows are highlighted with red boxes: CArep1, CArep2, NVrep1, ORep1, and WArep1. The 'ADD TO ROLES' dropdown menu is open, showing a list of roles: Administrators Only, Test Role 1, and View Only. The 'Save' button is also visible at the bottom of the dropdown menu.

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A
CArep1	Normal	a year ago	a year ago	SalesReps		A
CArep2	Normal	a year ago	a year ago	SalesReps		A
NormalUser	Normal	2 months ago	2 months ago		Test Role 1	I
NVrep1	Normal	a year ago	a year ago	SalesReps		A
ORep1	Normal	a year ago	a year ago	SalesReps		A
SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A
WArep1	Normal	a year ago	a year ago	SalesReps		A

Showing 1 to 11 of 11 entries

5. In the drop-down menu, select the roles you plan to assign to the selected users, and click Save.

We used the roles Test Role 1 and View Only.

The sequence of three screenshots illustrates the process of selecting roles for the users. The first screenshot shows the 'ADD TO ROLES' dropdown menu open, displaying three options: 'Administrators Only', 'Test Role 1', and 'View Only'. The second screenshot shows the 'Test Role 1' and 'View Only' options selected with checkboxes. The third screenshot shows the 'Save' button being clicked, indicating the completion of the role assignment process.

Results

Note the changes to the information in the Users interface.

The screenshot shows the 'Manage Users & Groups' interface in Arcadia Data. The table below represents the data shown in the interface:

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A
CArep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
CArep2	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
NormalUser	Normal	2 months ago	2 months ago		Test Role 1	I
NVrep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
ORep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A
WArep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A

Showing 1 to 11 of 11 entries

Deleting roles

Deleting a previously defined role in Role Based Access Control system is very simple.

About this task



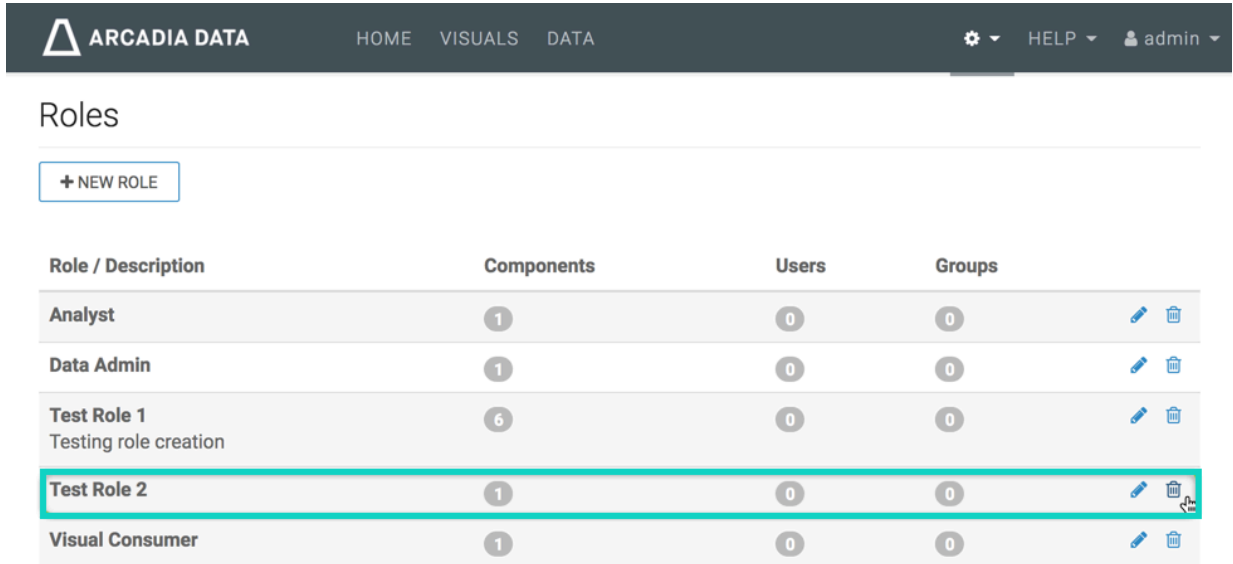
Note: This feature is only available to users with Manage roles and users privileges.

The following steps demonstrate how to add or change privileges defined for a specific role. We are using Test Role 1, previously defined in *Creating new roles*.

Procedure

- 1.
- 2.











3. In the Roles interface, next to the role to delete, click the Trashcan icon.



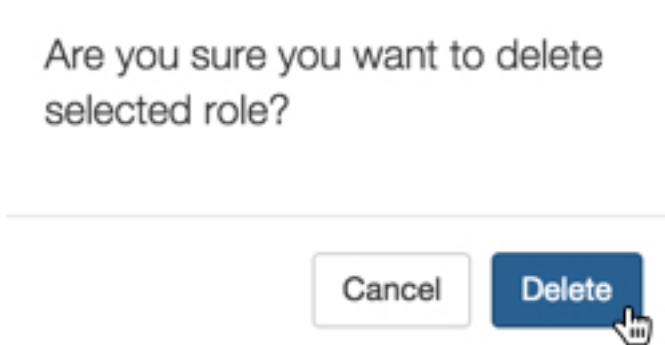
ARCADIA DATA HOME VISUALS DATA HELP admin

Roles

+ NEW ROLE

Role / Description	Components	Users	Groups	
Analyst	1	0	0	 
Data Admin	1	0	0	 
Test Role 1 Testing role creation	6	0	0	 
Test Role 2	1	0	0	 
Visual Consumer	1	0	0	 

4. In the Delete Confirmation modal window, click Delete.



Related Information

[Creating new roles](#)