

Publishing Datasets

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Configuring dataset recipient roles

This document outlines the steps for setting up Dataset Recipient roles, providing members with access to datasets at various levels.

About this task

Possible levels are:

- Manage dataset
- Manage dashboards
- View dashboards

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

Within this context, three distinct dataset roles—Data Admin, Analyst, and Visual Consumer—are established for each of the three organization groups: Marketing, Sales, and Operations.

Restriction:

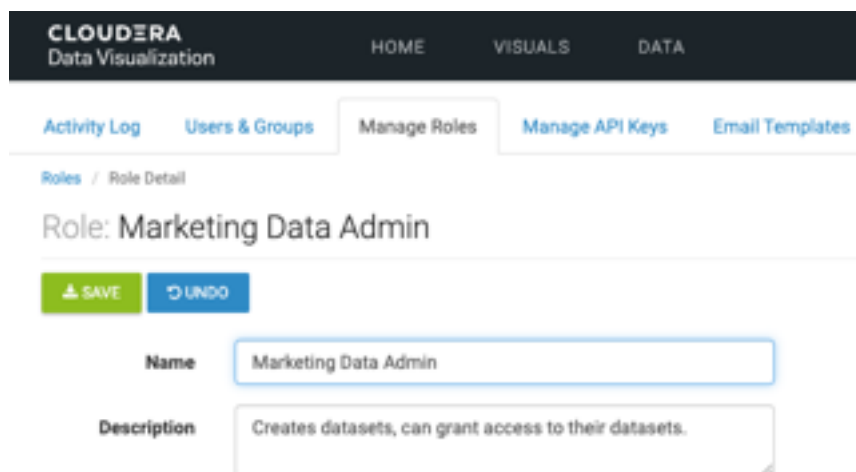
This task is for users with Manage roles and users privileges.

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 is a dark navigation bar with the logo and links for HOME, VISUALS, and DATA. Below this is a lighter navigation bar with links for Activity Log, Users & Groups, Manage Roles (which is highlighted), Manage API Keys, and Email Templates. The main content area shows the breadcrumb 'Roles / Role Detail' and the title 'Role: Marketing Data Admin'. Below the title are two buttons: a green 'SAVE' button and a blue 'UNDO' button. There 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. Cloudera Data Visualization 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

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.

About this task

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 role-based access control (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.

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

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

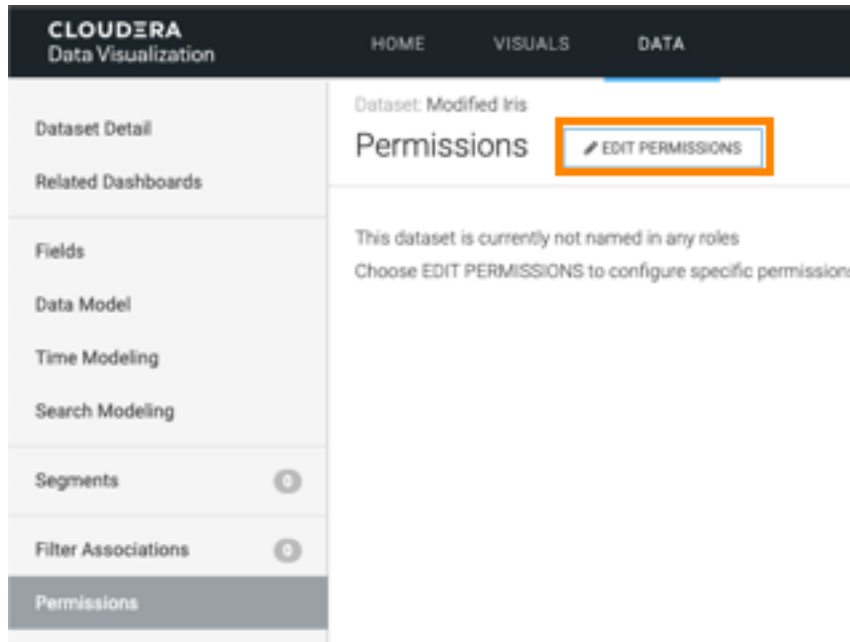
Publish

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 UNDO SAVE

Role	Connection / Dataset		Manage dataset	Manage dashboards	View dashboards
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](#)

[Configuring dataset recipient roles](#)

[Configuring the dataset publisher role](#)

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

[Assigning groups to roles](#)

[Assigning users to groups](#)

Configuring the dataset publisher role

This guide walks through the setup process for the Dataset Publisher role.

About this task

In this example, the members assigned to this role possess the ability to grant dataset access to other users, which can be categorized into three levels:

- Grant manage dataset
- Grant manage dashboards

- Grant view dashboards

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

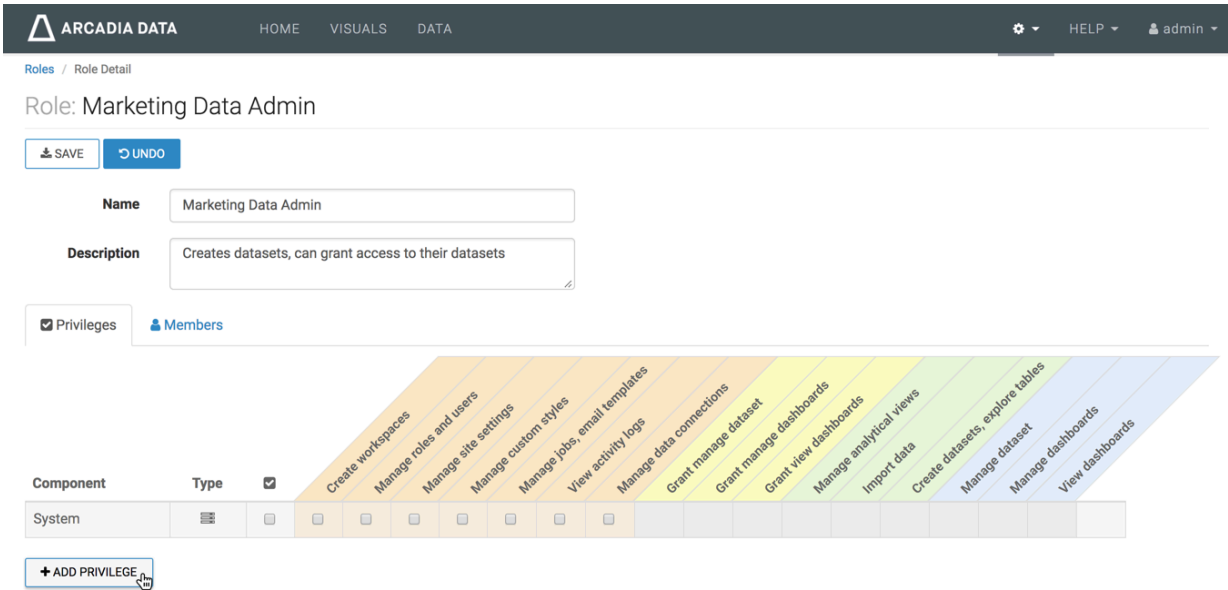
In an earlier section, three (3) dataset publishing roles (data admins) in *Setting the dataset recipient roles*, one each for the three organization groups: Marketing, Sales, and Operations were established. These are Marketing Data Admin, Sales Data Admin, and Operations Data Admin, respectively. The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

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

Follow these steps to specify 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 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.

6. Click CREATE.

Add Privilege

Component Type

Role

Roles(s)

Marketing Data Admin

CANCEL

CREATE

7. Leave this privilege with all options on, and click the ADD PRIVILEGE button to add the next privilege.

ARCADIA DATA

HOMEVISUALSDATA

HELPadmin

Roles / Role Detail

Role: Marketing Data Admin

SAVE

UNDO

Name

Marketing Data Admin

Description

Creates datasets, can grant access to their datasets.

Privileges

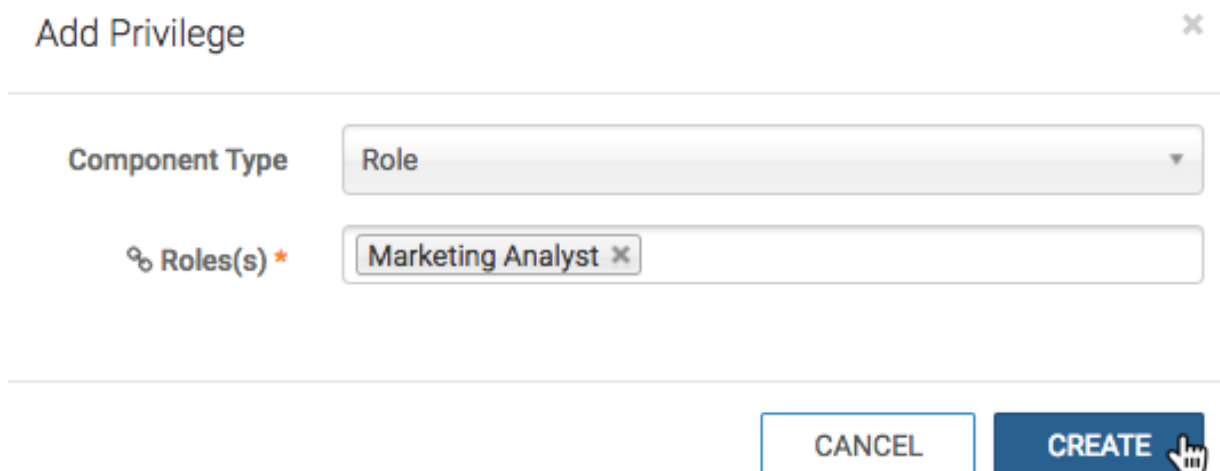
Members

Component	Type		Create workspaces	Manage roles and users	Manage styles and settings	View activity logs	Manage data connections	Grant manage dataset	Grant view dashboards	Manage analytical views	Import data	Create datasets, explore tables	Manage dataset	Manage dashboards	View dashboards
System															
Marketing Data Admin															

+ ADD PRIVILEGE

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

10. Click CREATE.

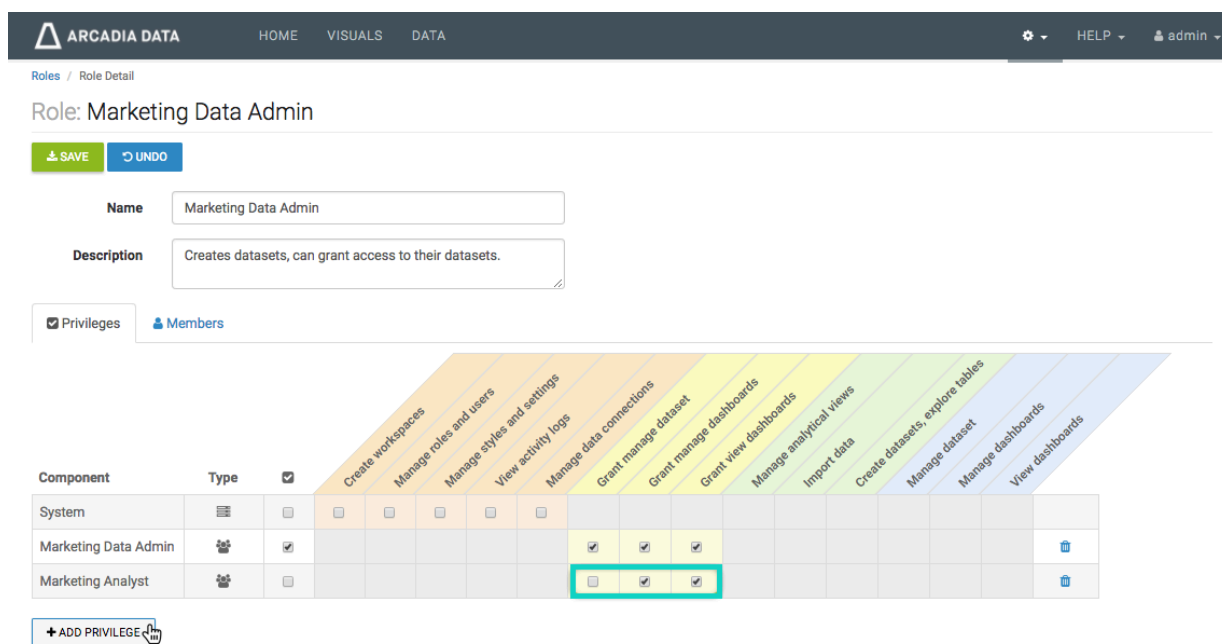


The 'Add Privilege' dialog box is shown. It has a title bar with a close button (X). Below the title bar, there is a 'Component Type' dropdown menu set to 'Role'. Below that is a 'Roles(s)' input field with a magnifying glass icon and a red star, containing the text 'Marketing Analyst' and a close button (X). At the bottom right, there are two buttons: 'CANCEL' and 'CREATE' (with a hand cursor icon).

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.



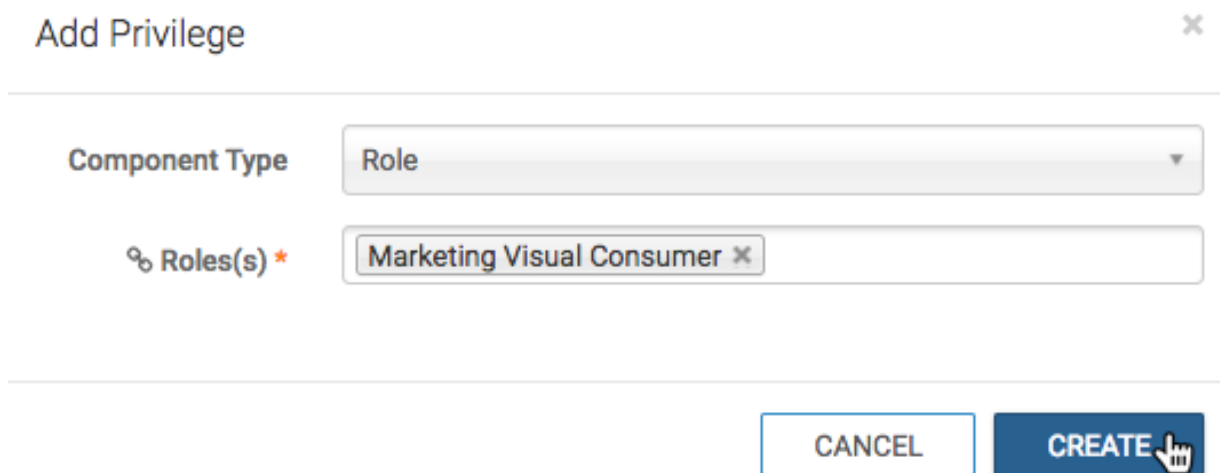
The 'Role Detail' page for 'Marketing Data Admin' is shown. It has a header with 'ARCADIA DATA' and navigation links 'HOME', 'VISUALS', and 'DATA'. Below the header, there are tabs for 'Privileges' (selected) and 'Members'. The 'Privileges' tab shows a table with columns for 'Component', 'Type', and a list of privileges. The 'Marketing Analyst' role is highlighted in the table, and the 'Grant manage dataset' checkbox is checked. Below the table, there is an 'ADD PRIVILEGE' button with a hand cursor icon.

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 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"/>
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"/>

13. Under Component Type, select Role.

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

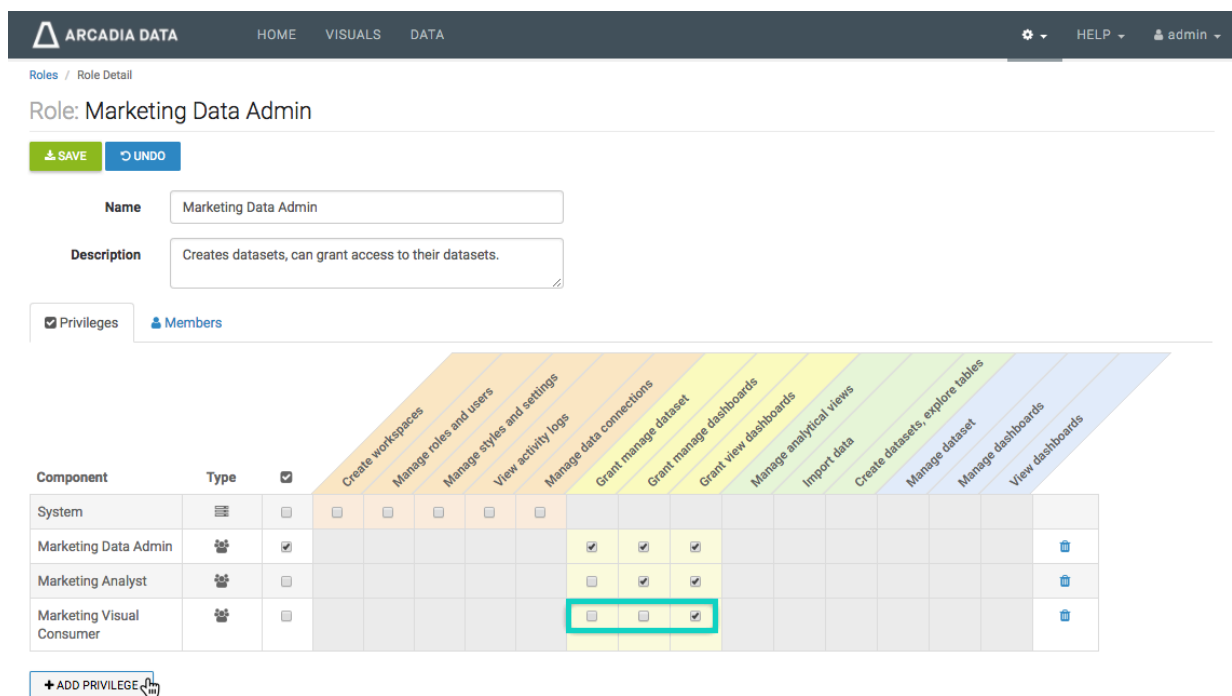
15. Click CREATE.



The 'Add Privilege' modal window shows the 'Component Type' dropdown set to 'Role'. Below it, the 'Roles(s)' field contains 'Marketing Visual Consumer'. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

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.



The 'Role: Marketing Data Admin' configuration page shows the role name and description. The 'Privileges' tab is active, displaying a table of privileges for various components. The 'Marketing Visual Consumer' role is highlighted in the table.

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"/>

Below the table is an '+ ADD PRIVILEGE' button.

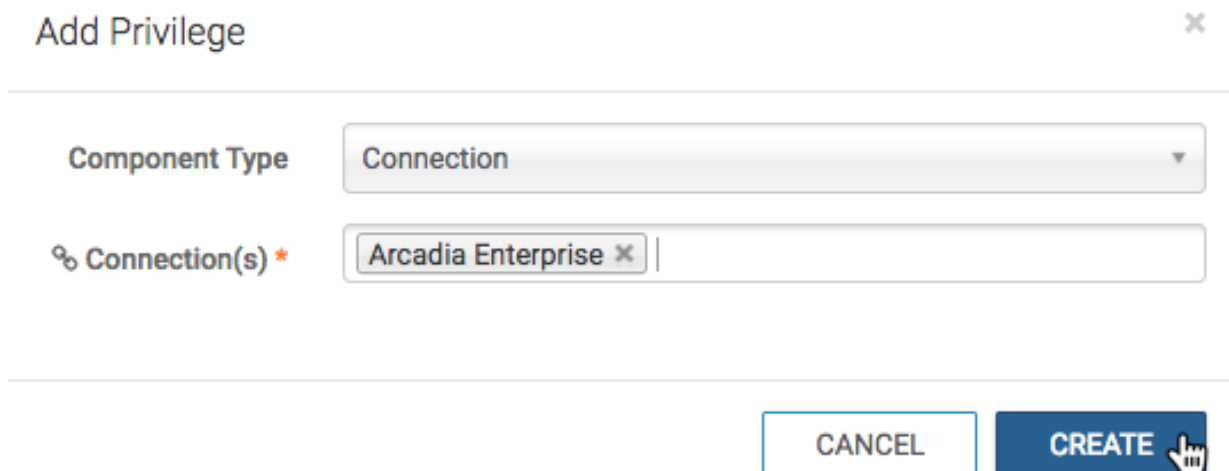
This time, let us declare connection-level privileges so that the Marketing Data Admin can access connected data, build datasets, and import supplemental data. Depending on the operational structure, we may also let the users with this role manage analytical views.

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.

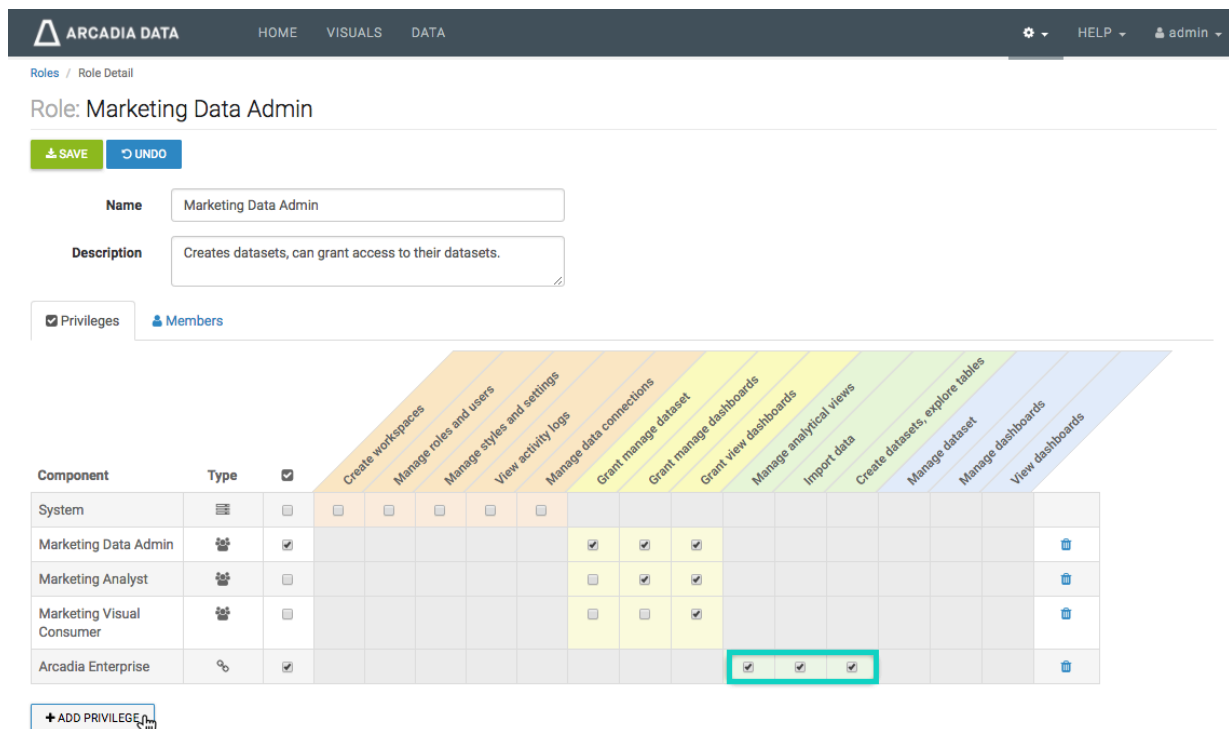
21. Click CREATE.



The 'Add Privilege' modal window shows the 'Component Type' set to 'Connection'. Under 'Connection(s)', 'Arcadia Enterprise' is selected. At the bottom right, there are 'CANCEL' and 'CREATE' buttons. A hand cursor is pointing at the 'CREATE' button.

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.



The 'Role Detail' page for 'Marketing Data Admin' shows the role's name and description. Below, there are tabs for 'Privileges' and 'Members'. The 'Privileges' tab is active, showing a table of permissions for various components. The 'Arcadia Enterprise' row is highlighted with a red box, indicating the selected connection-level privilege.

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"/>

Below the table is an '+ ADD PRIVILEGE' button with a hand cursor pointing at it.

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

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"/>							
Marketing Analyst		<input type="checkbox"/>					<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Marketing Visual Consumer		<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							
Arcadia Enterprise		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Arcadia Enterprise / All datasets		<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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

[Configuring dataset recipient roles](#)
[RBAC permissions](#)

Defining 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 Cloudera Data Visualization.



Note: 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 icon 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. 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.

Assigning 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.

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

The screenshot shows the 'Role: Marketing Data Admin' page in the Arcadia Data interface. The page has a dark header with the Arcadia Data logo and navigation links (HOME, VISUALS, DATA). Below the header, there are tabs for 'Privileges' (selected) and 'Members'. The 'Privileges' tab shows a 'Name' field with 'Marketing Data Admin' and a 'Description' field with 'Creates datasets, can grant access to their datasets.' Below this, there are two sections: 'Users' and 'Groups'. The 'Users' section has 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 table with a 'Group Name' column and a checkbox 'Require all groups'. The 'EDIT GROUP(S)' button in the 'Groups' section is highlighted with a red box.

ARCADIA DATA HOME VISUALS DATA

Roles / Role Detail

Role: Marketing Data Admin

SAVE UNDO

Name Marketing Data Admin

Description Creates datasets, can grant access to their datasets.

Privileges Members

Users 0 EDIT USER(S)

Username First Name Last Name

(these users were explicitly added and are not necessarily part of the added groups)

Groups 0 Require all groups EDIT GROUP(S)

Group Name


The Role Assignment modal window appears.

5. Select the groups Data_Admins and Marketing.
6. 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

CANCEL

APPLY

The Groups list now contains Data_Admins and Marketing.

8. Select the Require all groups option.

9. Click SAVE.

A confirmation message appears briefly.

The screenshot shows the 'Role: Marketing Data Admin' configuration page in the Arcadia Data interface. At the top, there's a navigation bar with 'HOME', 'VISUALS', and 'DATA'. Below it, the breadcrumb 'Roles / Role Detail' is visible. The role name 'Marketing Data Admin' is displayed, followed by a 'SAVE' button (highlighted with a mouse cursor) and an 'UNDO' button. Below these are input fields for 'Name' (containing 'Marketing Data Admin') and 'Description' (containing 'Creates datasets, can grant access to their datasets.'). There are tabs for 'Privileges' and 'Members'. At the bottom, there are sections for 'Users' (0) and 'Groups' (2). The 'Groups' section has a 'Require all groups' checkbox checked and highlighted with a red box. Below the 'Groups' section, a list of assigned groups is shown: 'Data_Admins' and '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	

Assigning 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, you 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

Q

Available to select

☐ Select All

☐ Analysts

☒ Data_Admins

☒ Marketing

☐ Operations

☐ Sales

☐ Visual_Consumers

ADD >>

<<

Selected

Select options from the left

+ ADD

CANCEL

SAVE

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*.

ARCADIA DATA

HOMEVISUALSDATA

HELPadmin

Manage Users & Groups

NEW USERNEW GROUP

Users10

Groups9

+ 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			<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	John_Marketing	Normal	2 hours ago	an hour ago	Marketing, Data_Admins	Marketing Data Admin	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Kate_Marketing	Normal	21 minutes ago	21 minutes ago	Marketing, Analysts	Marketing Analyst	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Lauren_Marketing	Normal	20 minutes ago	20 minutes ago	Marketing, Visual_Consumers	Marketing Visual Consumer	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Adele_Sales	Normal	13 minutes ago	13 minutes ago	Sales, Data_Admins	Sales Data Admin	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Beyonce_Sales	Normal	13 minutes ago	13 minutes ago	Sales, Analysts	Sales Analyst	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Cher_Sales	Normal	11 minutes ago	11 minutes ago	Sales, Visual_Consumers	Sales Visual Consumer	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Xuong_Operations	Normal	a minute ago	a minute ago	Data_Admins, Operations	Operations Data Admin	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Yoneda_Operations	Normal	a few seconds ago	a few seconds ago	Operations, Analysts	Operations Analyst	<div>A</div>	<div></div> <div></div>
<input type="checkbox"/>	Zariski_Operations	Normal	a few seconds ago	a few seconds ago	Operations, Visual_Consumers	Operations Visual Consumer	<div>A</div>	<div></div> <div></div>

Related Information

Assigning groups to roles