Cloudera Data Visualization 7.2.3

Configuring Restricting Row-Level Access

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Contents

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:

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:

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

- AZrep1
- CArep1
- CArep2
- NVrep1
- ORrep1
- WArep1

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:

Related Information

Creating new user groups

Creating new user accounts

Adding users to user groups

Setting roles

About this task

To enforce row-level access restrictions, it is important to define roles with appropriate privileges and assign them to individual users or user groups.

Procedure

1. Follow the instructions covered in *Creating segments from filter definitions* and *Editing role assignments*.

   For more information about permission sets, see *Role privileges*.

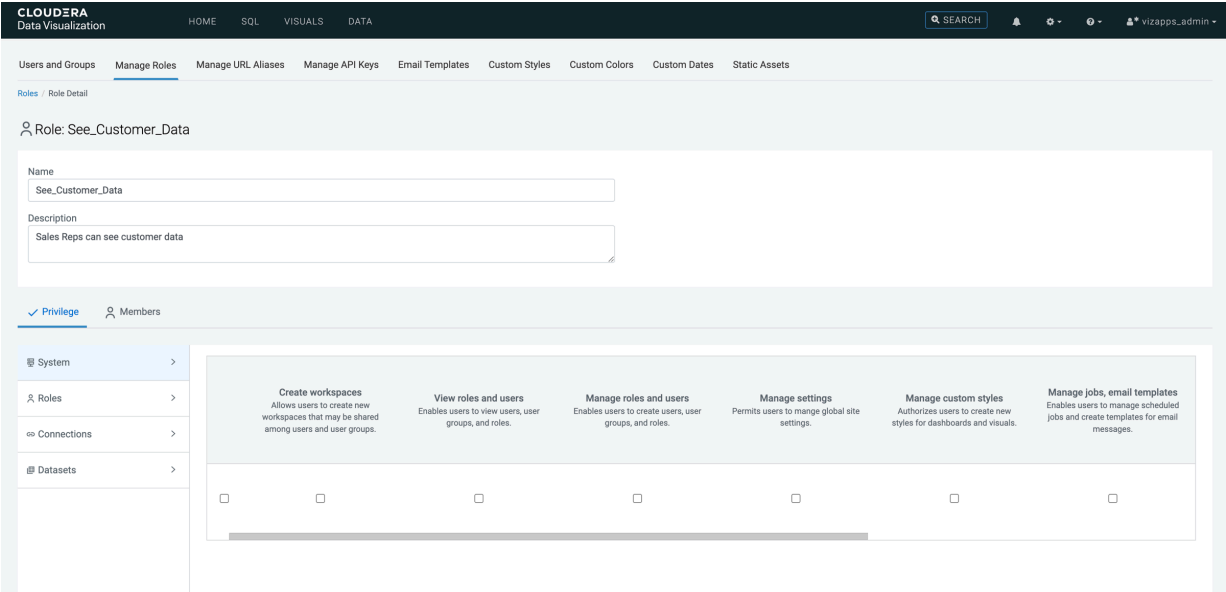**2.** Define a role with the following specifications:

Name

> See_Customer_Data

Description

> Sales Reps can see customer data

3. Configure the roles's privileges on the Privileges tab.

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

4. Add the SalesReps group to the role on the Members tab.

Users

> None

Groups

> SalesReps

Role: See_Customer_Data

SAVE	UNDO

Name See_Customer_Data

Description Sales Reps can see customer data

☑ 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 ① ☐ Require all groups [EDIT GROUP(S)]

Group Name
SalesReps

Related Information

Editing role assignments

Role privilages

Creating segments from filter definitions

Setting filter associations
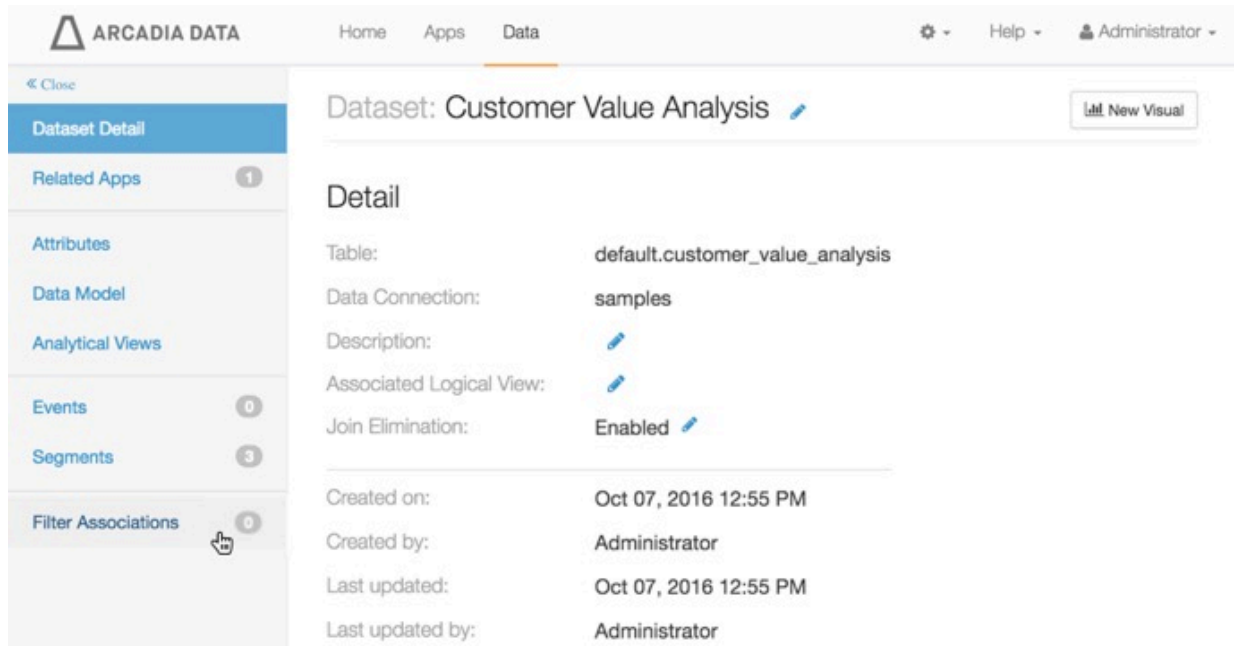
About this task

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.
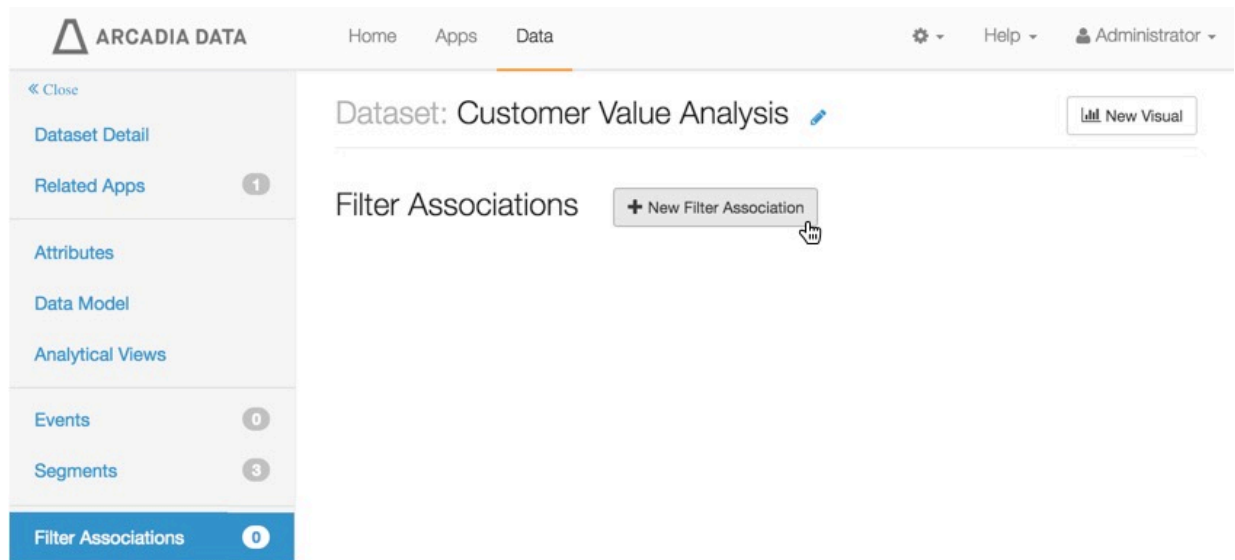
4. In the Dataset Detail menu, select Filter Associations.

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

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

👤 Users   👥 Groups

Search Users

Search   🔍

                                                        3

Available to select   Add >>   Selected

☐ Select All   <<   ☐ Select All

☐ AZrep1   ☐ CArep1

☐ Administrator   ☐ CArep2

☐ ArcadiaUser

☐ NVrep1

☐ ORrep1

☐ WArep1

☐ admin

                                                        4
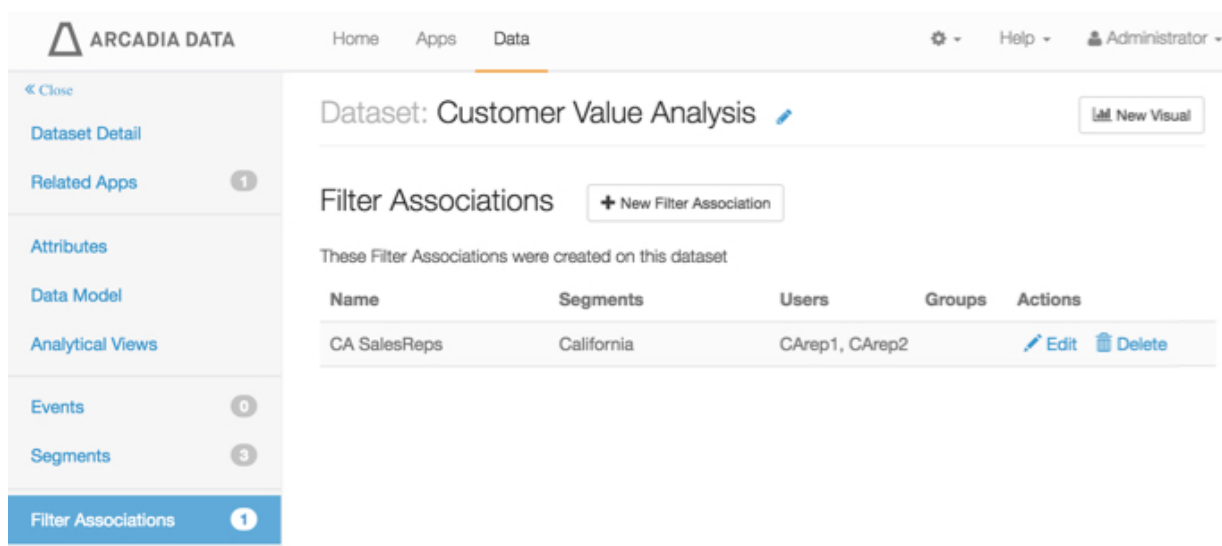
                                        Cancel   Create

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

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, WArep1

After you define these filter associations in your dataset, your Filter Associations interface should look like this:
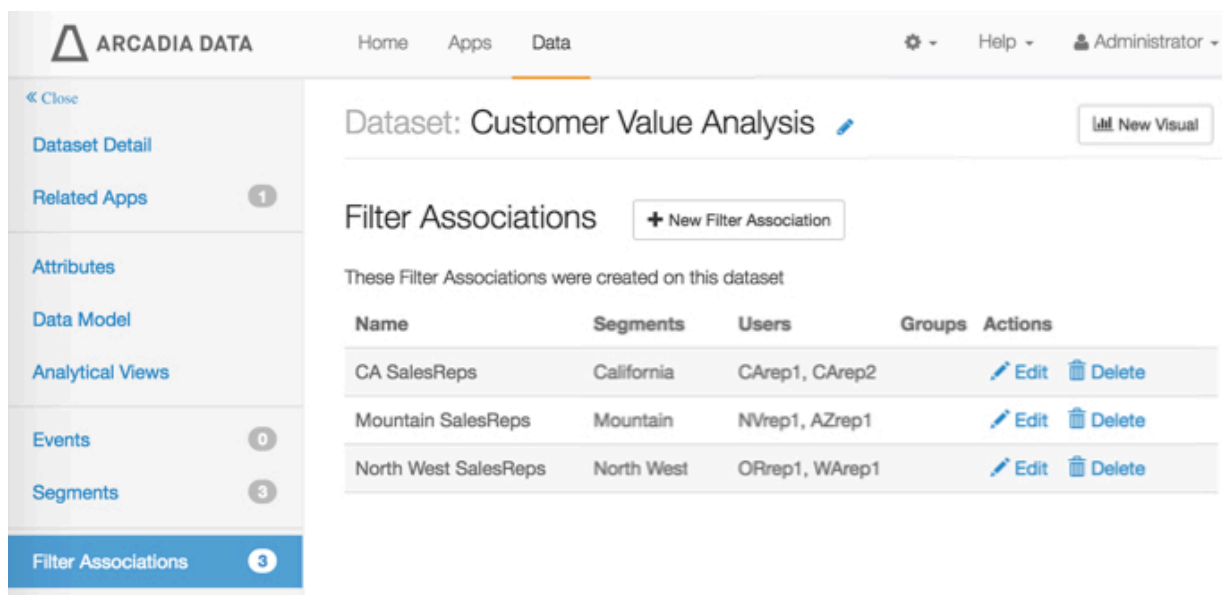
Verifying access restriction on a visual

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.
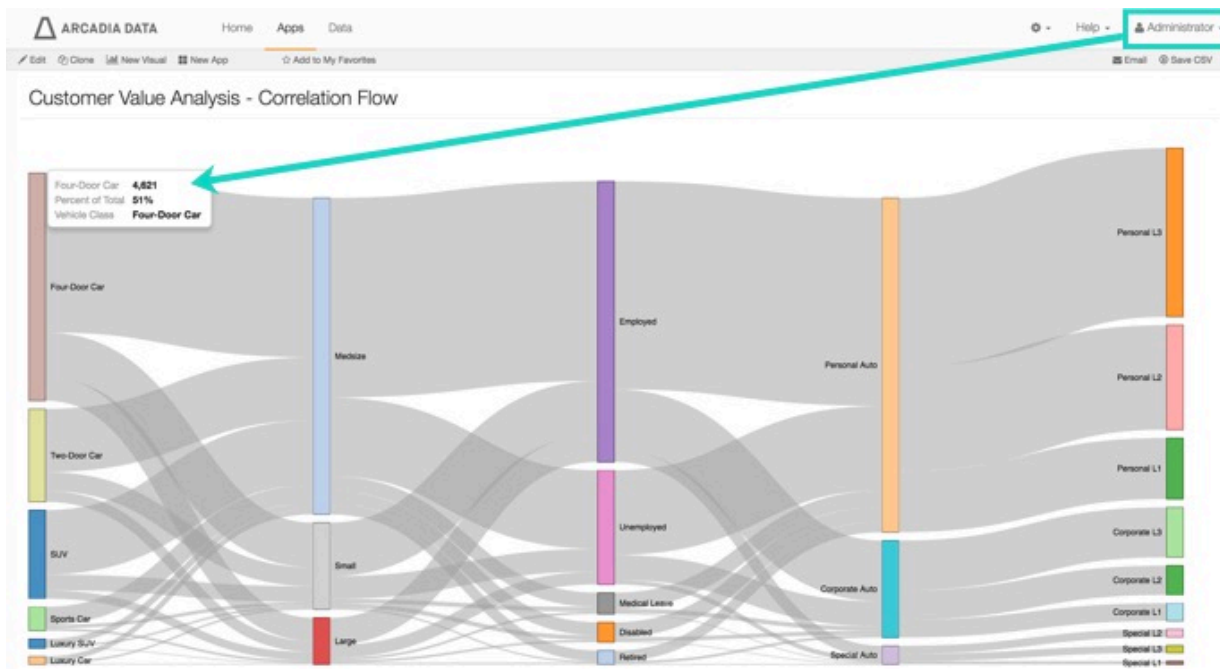
2. Log in as a user associated with the dataset through the CA SalesReps filter association. Such a user, in this case CArep1, can only see records available for the state of California. For example, when you navigate to the application, you can only see 1,593 records for Four-Door Cars.
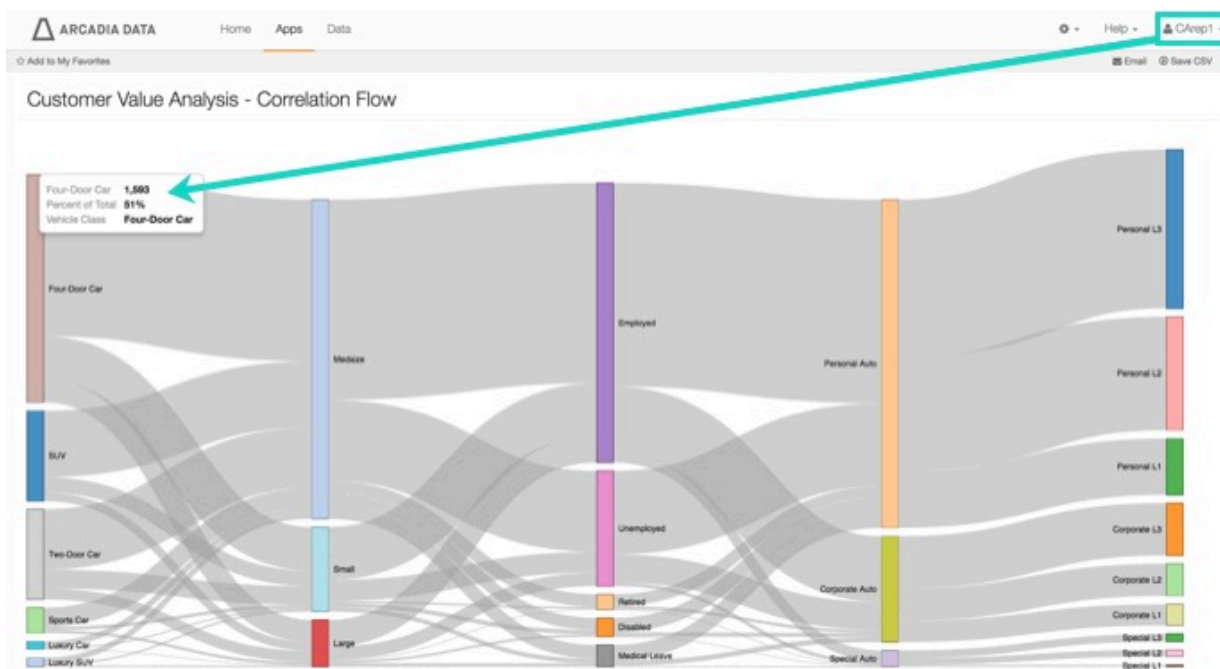
3. If you log in as AZrep1, a user associated with the dataset through the Mountain SalesReps filter association, you could only see records available for the states of Arizona and Nevada. For example, when you login as AZrep1 and navigate to the application, you can see only 1,325 records for Four-Door Cars.
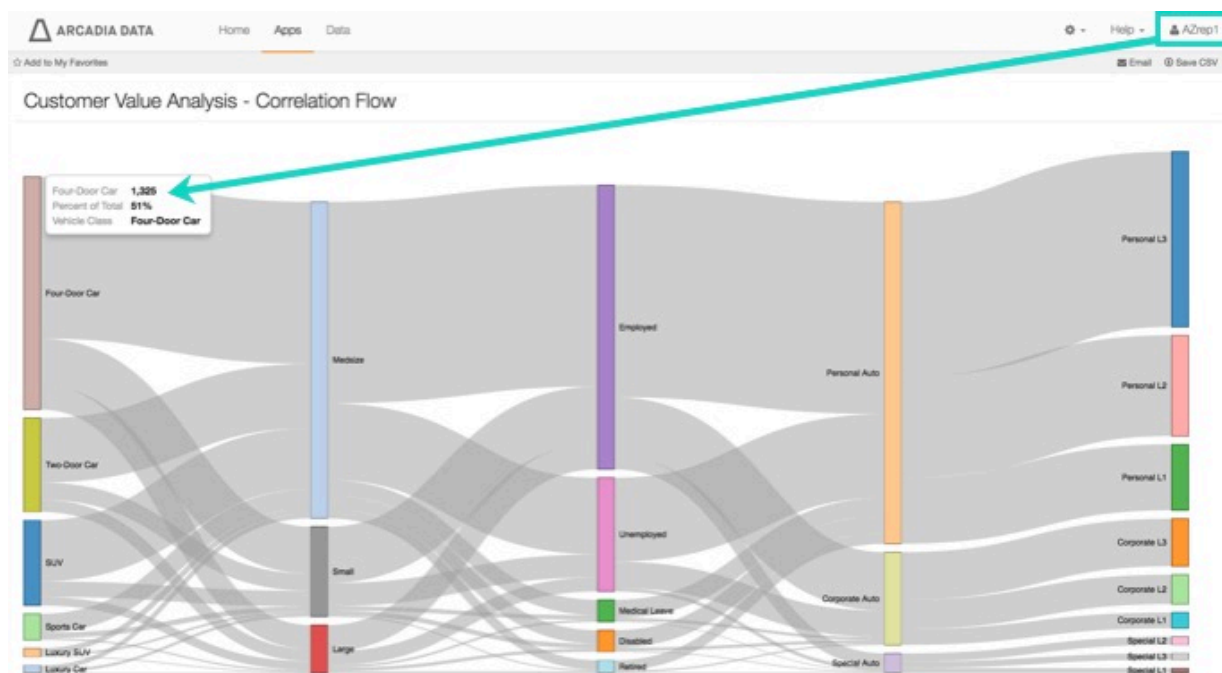
4. Finally, if you log in as WArep1, a user associated with the dataset through the North West SalesReps filter association, you would see records available for the states of Oregon and Washington, but none of the others. For example, when you login as WArep1 and navigate to the application, you see 1,703 records for Four-Door Cars.