

Configuring Restricting Row-Level Access

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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:

The screenshot shows the 'Dataset: US County Population' Segments interface. It includes a '+ NEW SEGMENT' button and a table with the following data:

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:

The screenshot shows the 'Manage Users & Groups' interface. It includes buttons for '+ NEW USER' and '+ NEW GROUP', and tabs for 'Users' and 'Groups'. Below the tabs is a table with the following data:

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
 - 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:

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		<div></div>	<div></div>
<input type="checkbox"/> CArep1	Normal	a minute ago	Never	SalesReps		<div></div>	<div></div>
<input type="checkbox"/> CArep2	Normal	a few seconds ago	Never	SalesReps		<div></div>	<div></div>
<input type="checkbox"/> NVrep1	Normal	a few seconds ago	Never	SalesReps		<div></div>	<div></div>
<input type="checkbox"/> ORrep1	Normal	a few seconds ago	Never	SalesReps		<div></div>	<div></div>
<input type="checkbox"/> WArep1	Normal	a few seconds ago	Never	SalesReps		<div></div>	<div></div>

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*.

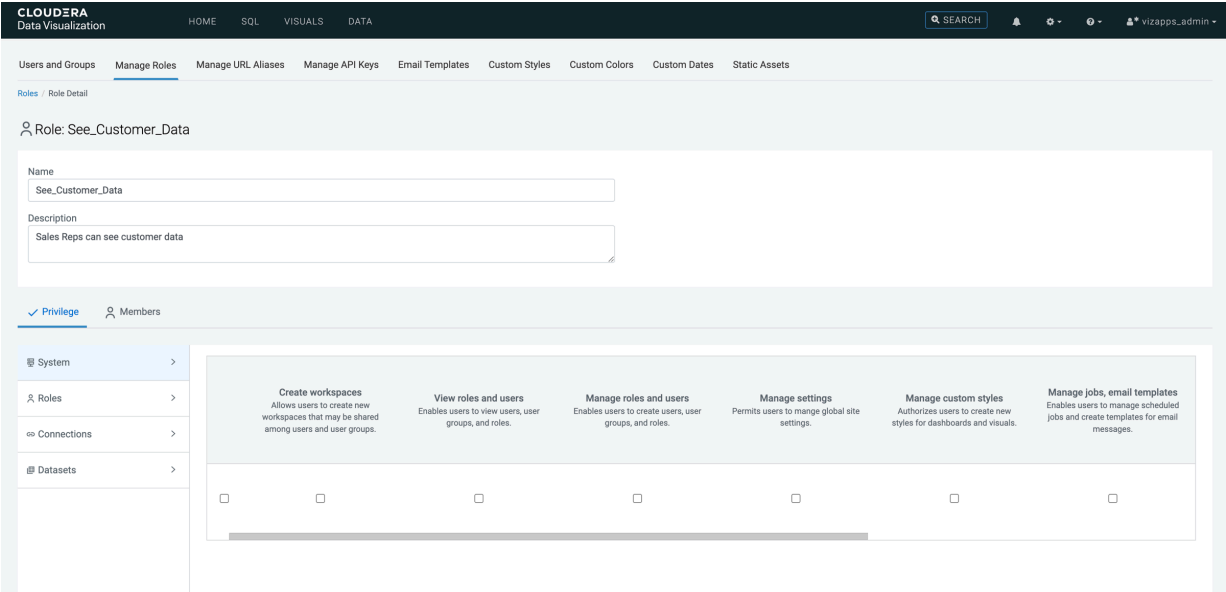
2. Define a role with the following specifications:

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

EDIT USER(S)

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

Groups

Require all groups

EDIT GROUP(S)

Group Name
SalesReps

Related Information

[Editing role assignments](#)

[Role privileges](#)

[Creating segments from filter definitions](#)

Setting filter associations

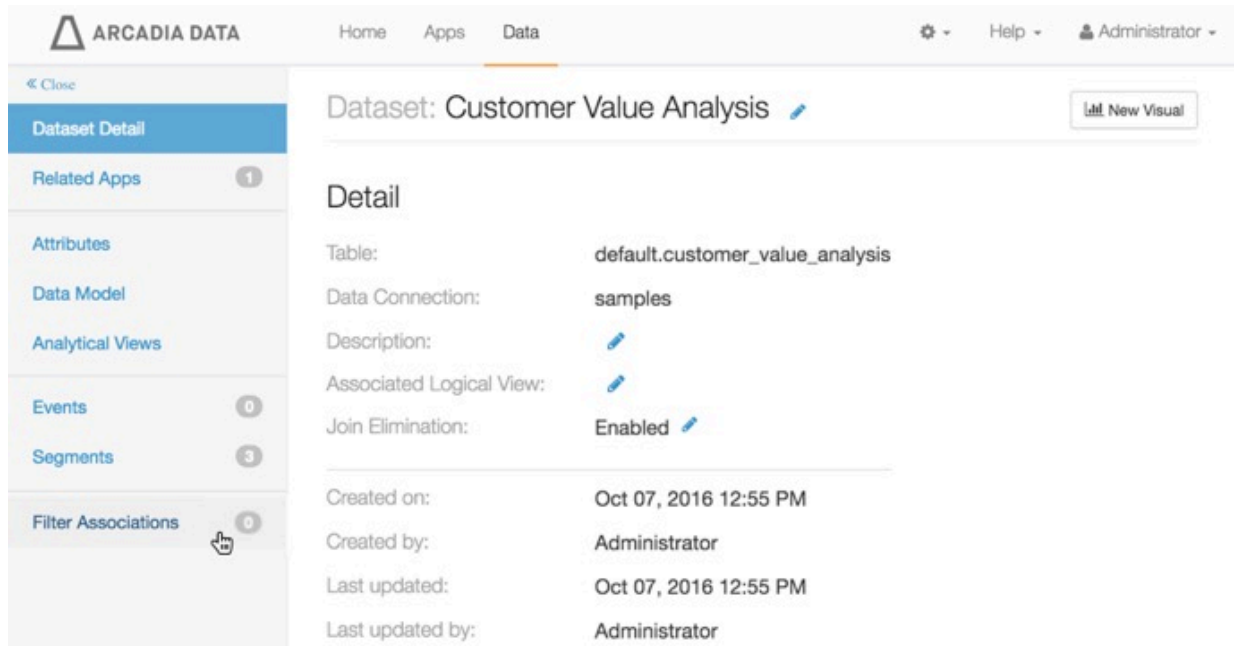
About this task

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.

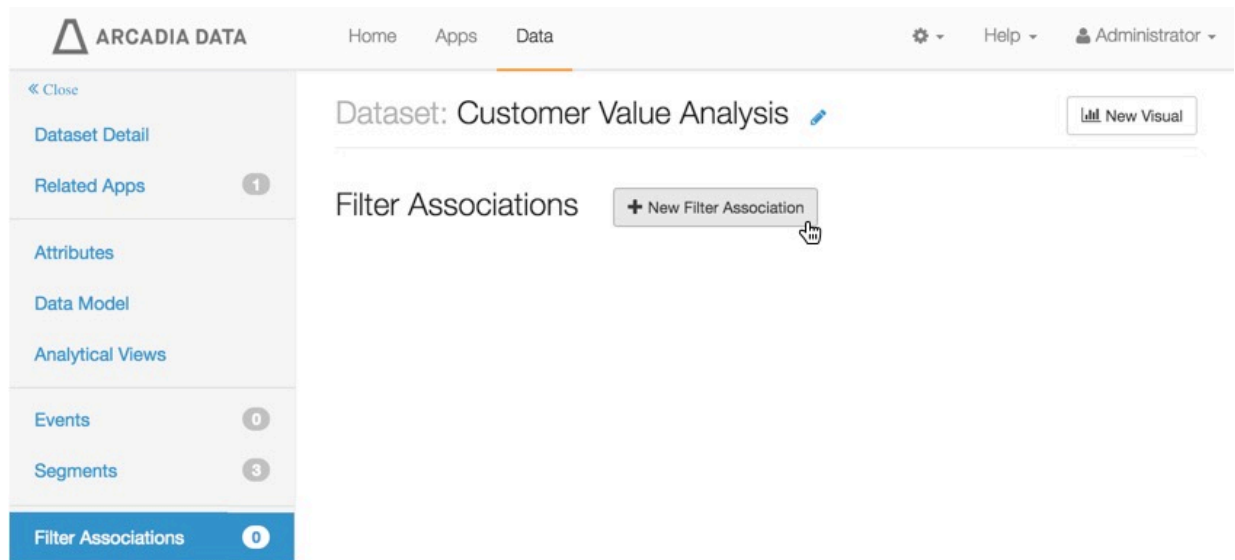
4. In the Dataset Detail menu, select Filter Associations.



The screenshot shows the Arcadia Data web interface. The top navigation bar includes the Arcadia Data logo, 'Home', 'Apps', and 'Data' tabs, along with settings, help, and user profile links. The left sidebar contains a 'Dataset Detail' menu with options: 'Dataset Detail' (selected), 'Related Apps' (1), 'Attributes', 'Data Model', 'Analytical Views', 'Events' (0), 'Segments' (3), and 'Filter Associations' (0). The main content area displays 'Dataset: Customer Value Analysis' with a 'New Visual' button. Below this is a 'Detail' section with the following 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

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



The screenshot shows the Arcadia Data web interface with the 'Filter Associations' menu item selected in the left sidebar. The main content area displays 'Dataset: Customer Value Analysis' with a 'New Visual' button. Below this is a 'Filter Associations' section with a '+ New Filter Association' button highlighted by a mouse cursor.

- 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

Applied Segments

Geographic Regions

☒ is California

☐ is Mountain

☐ is North West

Users

Groups

Search Users

Search

Available to select

☐ Select All

☐ AZrep1

☐ Administrator

☐ ArcadiaUser

☐ NVrep1

☐ ORrep1

☐ WAreps1

☐ admin

3

Add >>

<<

Selected

☐ Select All

☐ CAreps1

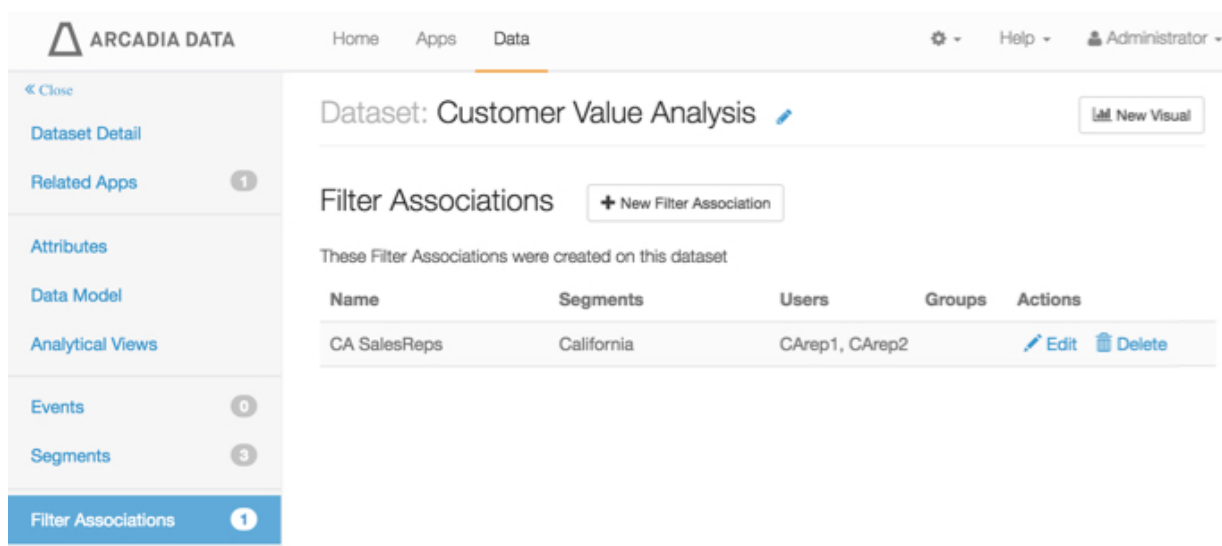
☐ CAreps2

4

Cancel

Create

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

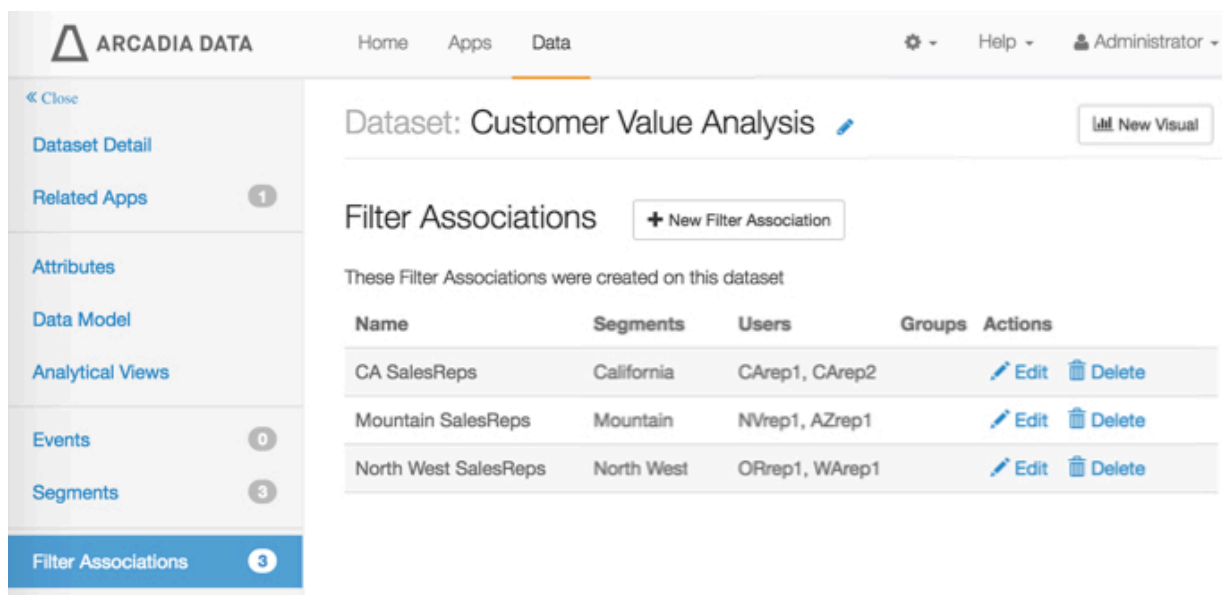


8. Repeat, and add two more filter associations, as follows:

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, WArepl

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



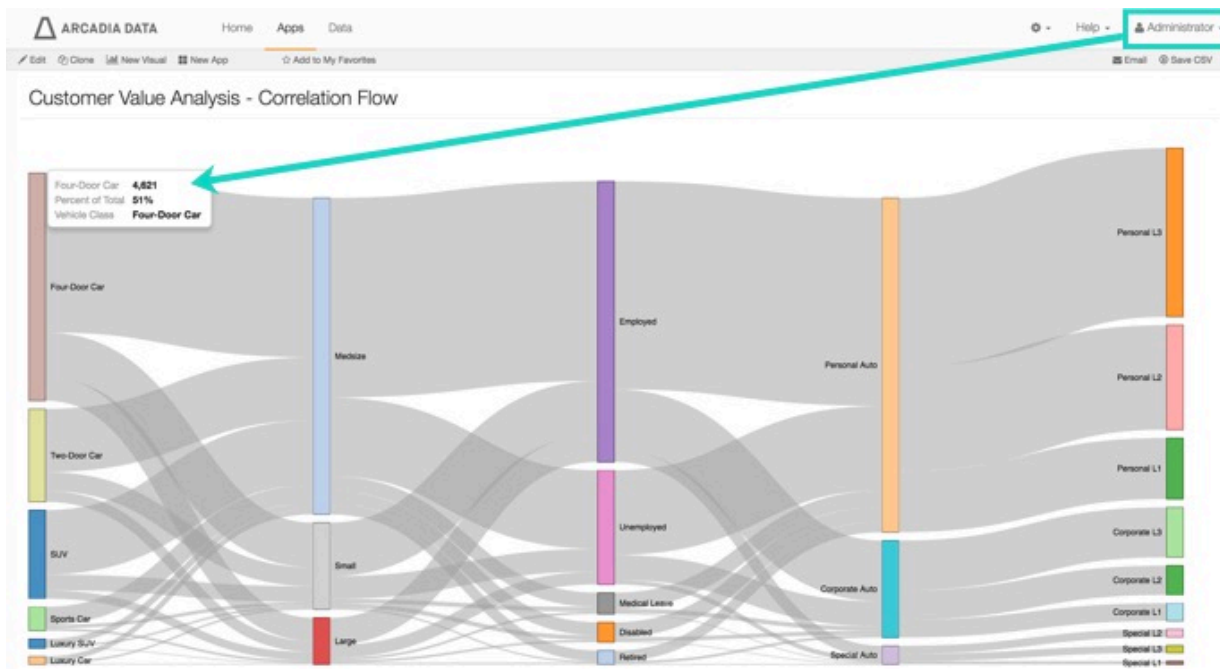
Verifying access restriction on a visual

About this task

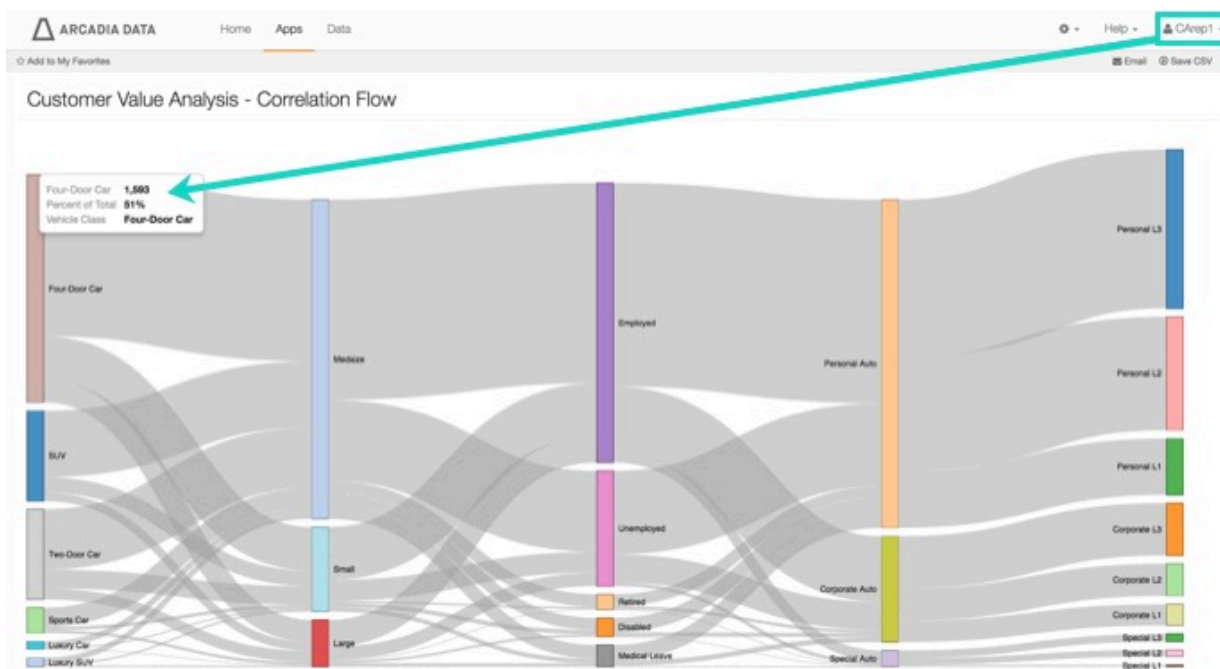
To ensure that we specified the access restrictions correctly, let us view the same visual as an Administrative user, and as a user who is linked to each of the three filter associations declared in the previous section.

Procedure

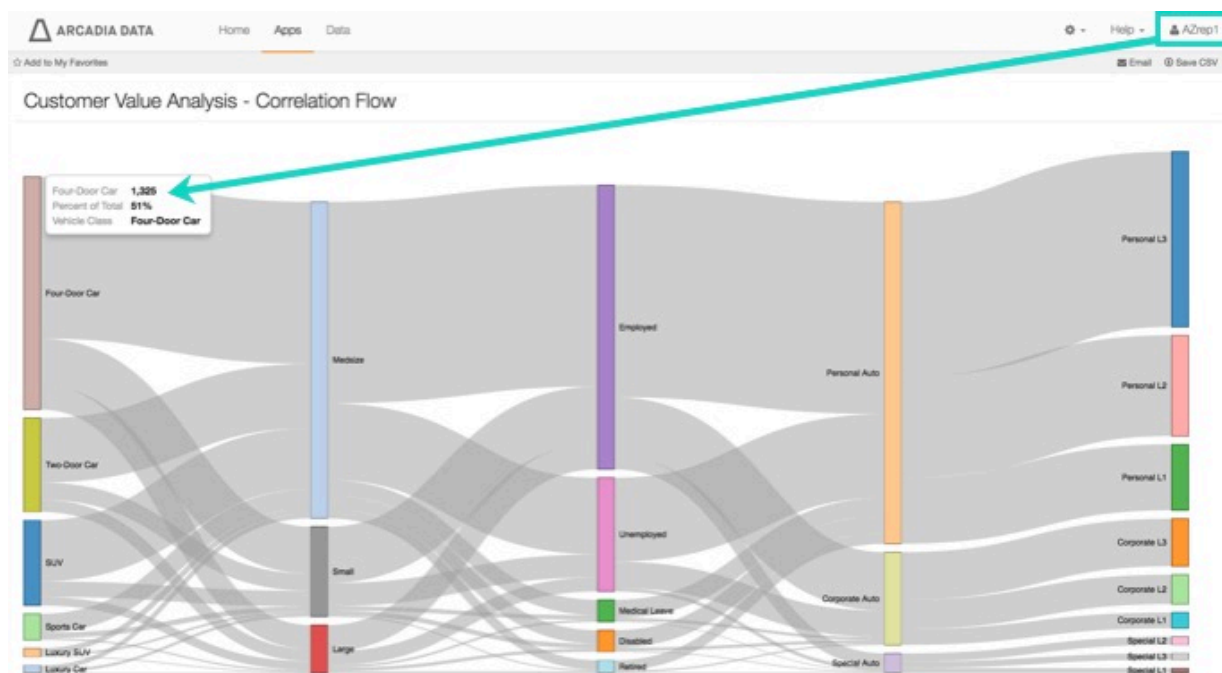
1. Log in as a user with Administrative privileges, and navigate to the application. Notice that the entire dataset appears in the visual; for example, it shows 4,621 Four-Door Cars.



2. Log in as a user associated with the dataset through the CA SalesReps filter association. Such a user, in this case CArepl, 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 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.

