

## 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.



**Note:** Privileges and membership will be defined later.

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	
<b>Marketing Analyst</b> Can create dashboards.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Marketing Data Admin</b> Creates datasets, can grant access to their datasets.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Marketing Visual Consumer</b> Can view dashboards.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Operations Analyst</b> Can create dashboards.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Operations Data Admin</b> Creates datasets, can grant access to their datasets.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Operations Visual Consumer</b> Can view dashboards.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>
<b>Sales Analyst</b> Can create dashboards.	1	0	1	<a href="#">✎</a> <a href="#">✕</a>
<b>Sales Data Admin</b> Creates datasets, can grant access to their datasets.	1	0	1	<a href="#">✎</a> <a href="#">✕</a>
<b>Sales Visual Consumer</b> Can view dashboards.	1	0	0	<a href="#">✎</a> <a href="#">✕</a>

## 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, it is better to 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. In this example, you log in as user John\_Marketing.
2. Navigate to the dataset you plan to publish. In this example, you 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 (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.

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Data Visualization

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[DATA](#)

Dataset Detail  
 Related Dashboards

Fields  
 Data Model  
 Time Modeling  
 Search Modeling  
 Data Extracts  
 Segments 0  
 Filter Associations 0  
**Permissions**

Dataset: Modified Iris  
**Permissions**
UNDO
SAVE

Role	Connection / Dataset		Manage dataset	Manage dashboards	View dashboards
<a href="#">Marketing Data Admin</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Marketing Analyst</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Marketing Visual Consumer</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Sales Data Admin</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Sales Analyst</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Sales Visual Consumer</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Operations Data Admin</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Operations Analyst</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Operations Visual Consumer</a>	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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, you 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
Marketing Data Admin	samples / Modified Iris	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>
Sales Analyst	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Visual Consumer	samples / Modified Iris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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.

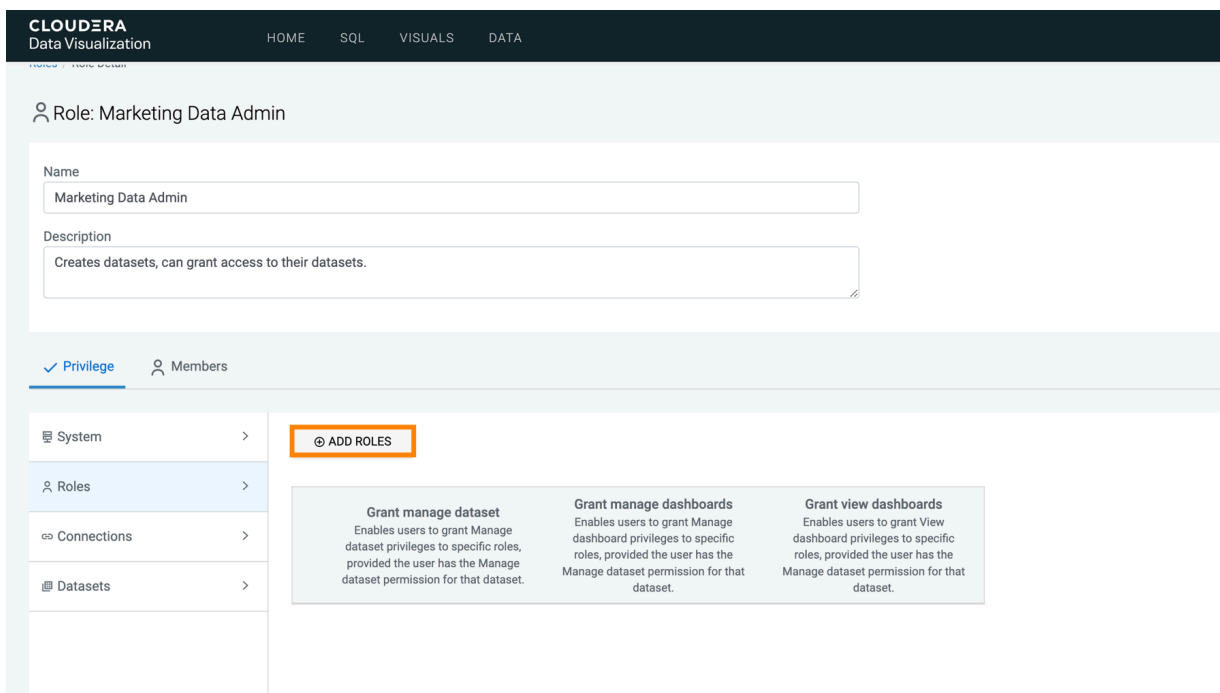
In an earlier section, three (3) dataset publishing roles (data admins) in *Setting the dataset recipient roles*, one each for the three organization groups: Marketing, Sales, and Operations were established. These are Marketing Data Admin, Sales Data Admin, and Operations Data Admin, respectively. The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

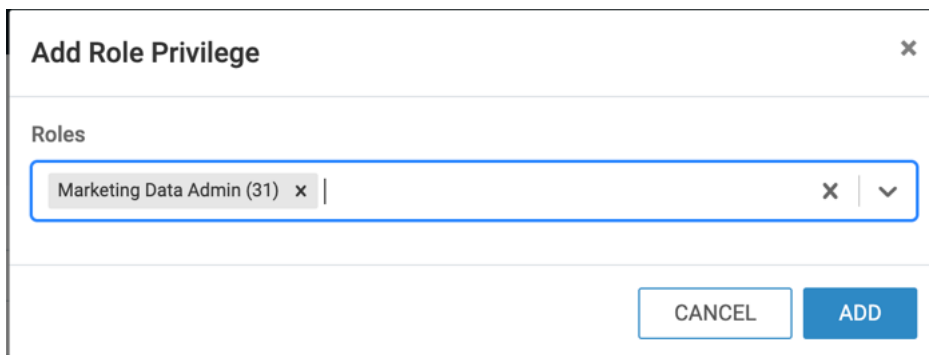
1. In the Roles interface, click either the name of the role, Marketing Data Admin, or the Edit icon on its role.
2. In the Role Detail interface, click ADD ROLES.



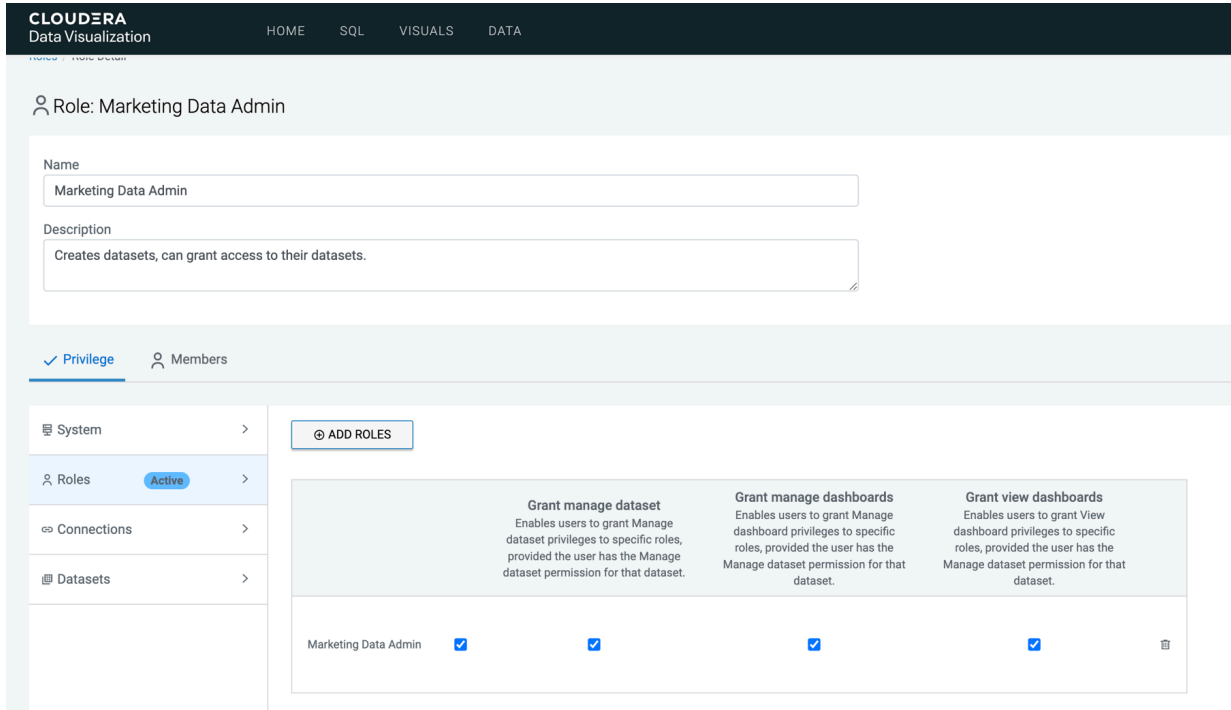
The Add Role Privilege modal window appears.

3. From Roles, select Marketing Data Admin, a role defined previously.

Note that this enables individuals with the Marketing Data Admin role to grant privileges to others with the same role.



## 4. Click ADD.



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Data Visualization

HOME SQL VISUALS DATA

Role: Marketing Data Admin

Name  
Marketing Data Admin

Description  
Creates datasets, can grant access to their datasets.

✓ Privilege Members

System > ADD ROLES

Roles **Active** >

Connections >

Datasets >

	Grant manage dataset Enables users to grant Manage dataset privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	Grant manage dashboards Enables users to grant Manage dashboard privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	Grant view dashboards Enables users to grant View dashboard privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	
Marketing Data Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

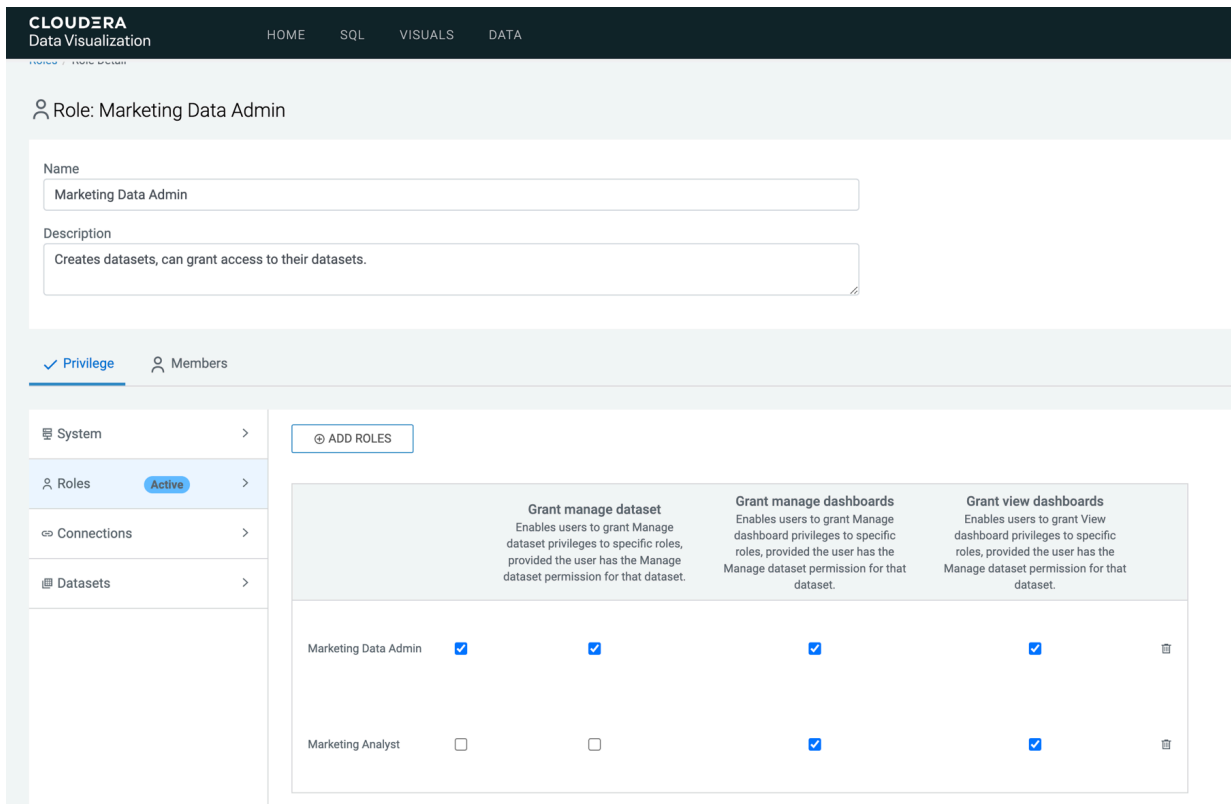
5. Leave the added privilege with all options on, and click ADD ROLES again to add the next privilege.

6. From Roles, select Marketing Analyst, a role defined previously.

7. Click ADD.

8. Deselect the Grant manage dataset option for this privilege.

This is because analysts should not be altering the dataset.



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**CLOUDERA**  
Data Visualization

HOME SQL VISUALS DATA

Role: Marketing Data Admin

Name  
Marketing Data Admin

Description  
Creates datasets, can grant access to their datasets.

✓ Privilege Members

System > ADD ROLES

Roles **Active** >

Connections >

Datasets >

	Grant manage dataset Enables users to grant Manage dataset privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	Grant manage dashboards Enables users to grant Manage dashboard privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	Grant view dashboards Enables users to grant View dashboard privileges to specific roles, provided the user has the Manage dataset permission for that dataset.	
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"/>

9. Click ADD ROLES to add the next privilege.
10. From Roles, select Marketing Visual Consumer, a role defined previously, then click ADD.
11. 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.
12. Click the Connections tab.
13. Click ADD CONNECTIONS to add the next privilege to 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.
14. From Connections, select impala.
15. Click ADD.

**CLUSTERA**  
Data Visualization

HOME SQL VISUALS DATA

Roles / Role Detail

Role: Marketing Data Admin

Name  
Marketing Data Admin

Description  
Creates datasets, can grant access to their datasets.

Privilege Members

System Roles Connections Datasets

ADD CONNECTIONS

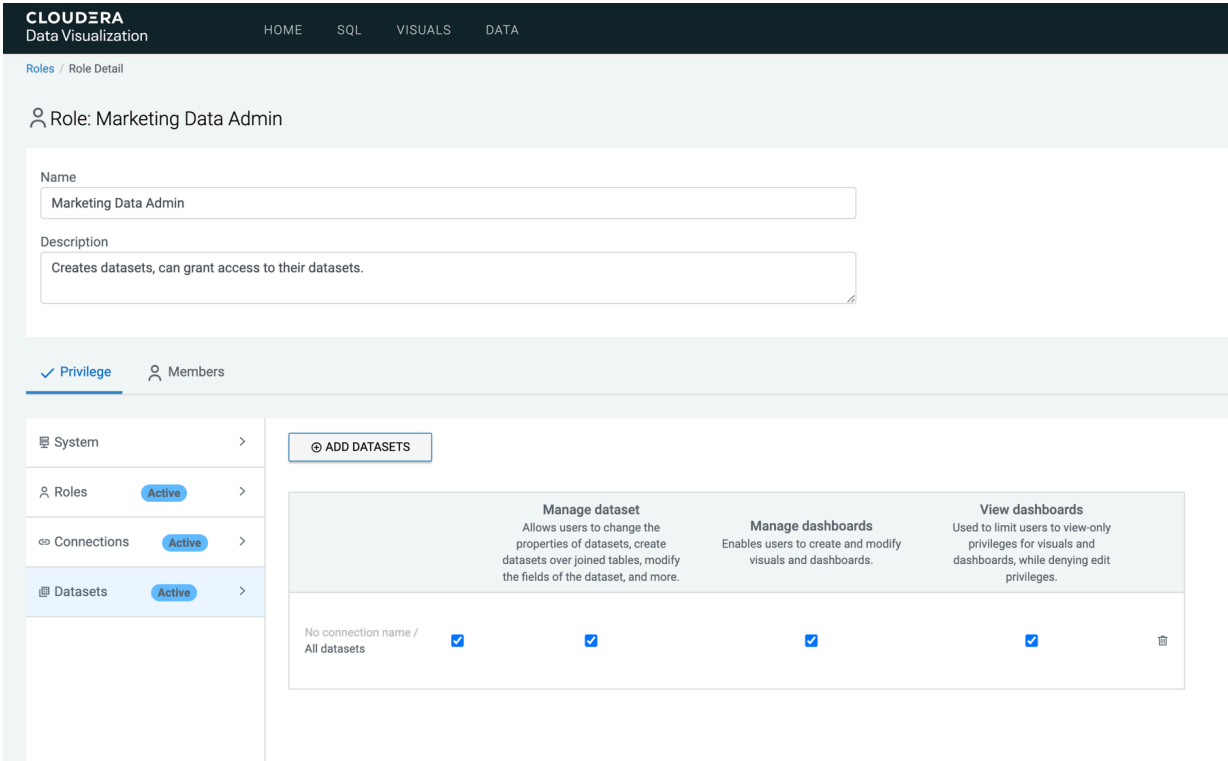
	Manage AVs/Extracts Enables users to create and manage analytical views and data extracts.	Import data Allows users to import supplemental data into an existing connection.	Create datasets, explore tables Allows users to create new datasets from existing tables, view sample data, and explore statistical reports on the data tables.
impala	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

16. Leave this privilege with all options on (Manage AVs/Extracts, Import data, and Create datasets, explore tables).
17. Click the Datasets tab.
18. Click ADD DATASETS to add the next privilege.

Finally, you declare dataset-level privileges. You 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, you simply let members of the Marketing Data Admin role access all existing datasets on the Impala connection.

19. From Connections, select impala.
20. From Datasets, select All datasets.

21. Click ADD.



22. Leave this privilege with all options on (Manage dataset, Manage dashboards, and View dashboards)
23. Click APPLY CHANGES at the bottom of the page to save the new definitions for Marketing Data Admin.
24. 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"><li>Grant manage dataset</li><li>Grant manage dashboards</li><li>Grant view dashboards</li></ul>
	Role: Marketing Analyst	<ul style="list-style-type: none"><li>Grant manage dashboards</li><li>Grant view dashboards</li></ul>
	Role: Marketing Visual Consumer	<ul style="list-style-type: none"><li>Grant view dashboards</li></ul>
	Connection: Arcadia Enterprise	<ul style="list-style-type: none"><li>Manage analytical views</li><li>Import data</li><li>Create datasets, explore tables</li></ul>
	Dataset: Arcadia Enterprise, All Datasets	<ul style="list-style-type: none"><li>Manage dataset</li><li>Manage dashboards</li><li>View dashboards</li></ul>
Sales Data Admin	Role: Sales Data Admin	<ul style="list-style-type: none"><li>Grant manage dataset</li><li>Grant manage dashboards</li><li>Grant view dashboards</li></ul>
	Role: Sales Analyst	<ul style="list-style-type: none"><li>Grant manage dashboards</li><li>Grant view dashboards</li></ul>

Role Name	Component	Permission
	Role: Sales Visual Consumer	<ul style="list-style-type: none"> <li>Grant view dashboards</li> </ul>
	Connection: Arcadia Enterprise	<ul style="list-style-type: none"> <li>Manage analytical views</li> <li>Import data</li> <li>Create datasets, explore tables</li> </ul>
	Dataset: Arcadia Enterprise, All Datasets	<ul style="list-style-type: none"> <li>Manage dataset</li> <li>Manage dashboards</li> <li>View dashboards</li> </ul>
Operations Data Admin	Role: Operations Data Admin	<ul style="list-style-type: none"> <li>Grant manage dataset</li> <li>Grant manage dashboards</li> <li>Grant view dashboards</li> </ul>
	Role: Operations Analyst	<ul style="list-style-type: none"> <li>Grant manage dashboards</li> <li>Grant view dashboards</li> </ul>
	Role: Operations Visual Consumer	<ul style="list-style-type: none"> <li>Grant view dashboards</li> </ul>
	Connection: Arcadia Enterprise	<ul style="list-style-type: none"> <li>Manage analytical views</li> <li>Import data</li> <li>Create datasets, explore tables</li> </ul>
	Dataset: Arcadia Enterprise, All Datasets	<ul style="list-style-type: none"> <li>Manage dataset</li> <li>Manage dashboards</li> <li>View dashboards</li> </ul>

### 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 Cloudera 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\_Admns.
5. You may choose to add users to the group at this point, or 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

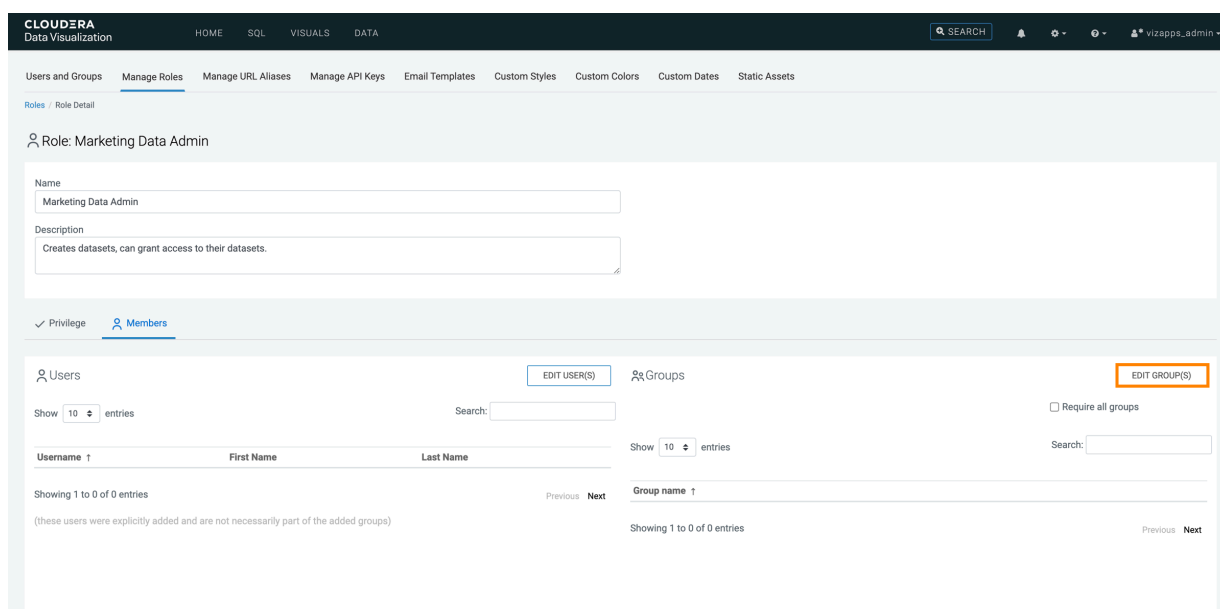
## About this task

- 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 that depending on your architecture, this definition may happen at the LDAP layer, with groups visible to Cloudera 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 row.
3. In the Role Detail interface, select the Members tab.
4. In Groups section, click EDIT GROUP(S).



The Role Assignment modal window appears.

5. Select the groups Data\_Admins and Marketing.

6. Click ADD.

**Role Assignment** ×

---

**Members**

Search Q

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

Enter new group name + ADD

CANCEL APPLY

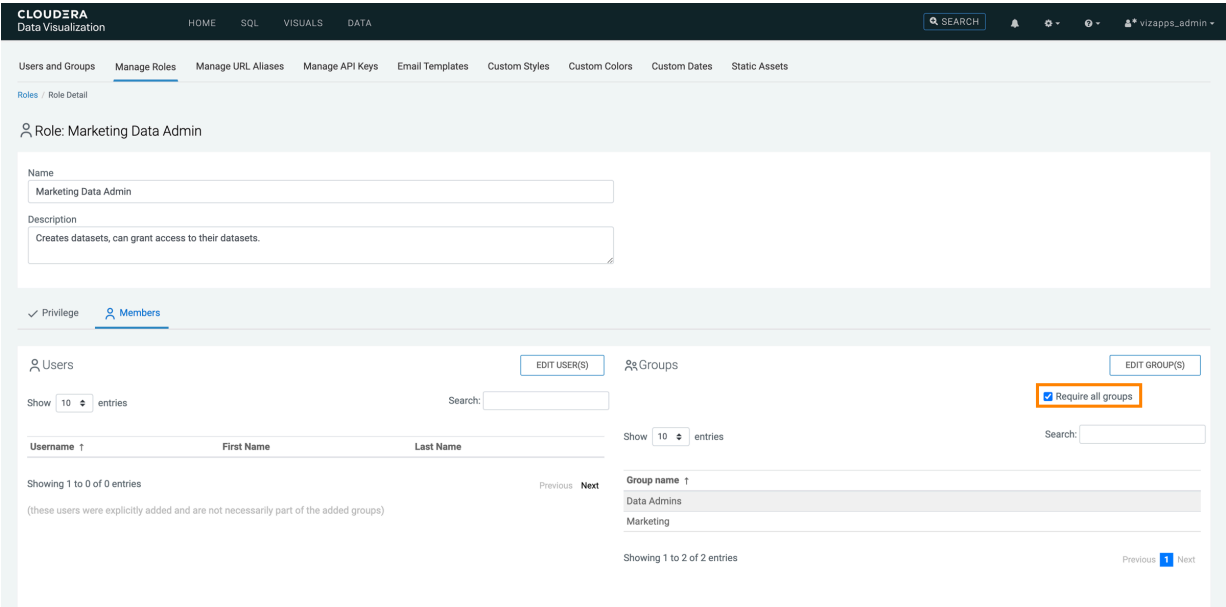
7. Click APPLY.

The Groups list now contains Data\_Admins and Marketing.

8. Select the Require all groups option.

9. Click SAVE.

A confirmation message appears briefly.



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"><li>Data_Admins</li><li>Marketing</li></ul>
Marketing Analyst	<ul style="list-style-type: none"><li>Analysts</li><li>Marketing</li></ul>
Marketing Visual Consumer	<ul style="list-style-type: none"><li>Visual_Consumers</li><li>Marketing</li></ul>
Sales Data Admin	<ul style="list-style-type: none"><li>Data_Admins</li><li>Sales</li></ul>
Sales Analyst	<ul style="list-style-type: none"><li>Analysts</li><li>Sales</li></ul>
Sales Visual Consumer	<ul style="list-style-type: none"><li>Visual_Consumers</li><li>Sales</li></ul>
Operations Data Admin	<ul style="list-style-type: none"><li>Data_Admins</li><li>Operations</li></ul>
Operations Analyst	<ul style="list-style-type: none"><li>Analysts</li><li>Operations</li></ul>
Operations Visual Consumer	<ul style="list-style-type: none"><li>Visual_Consumers</li><li>Operations</li></ul>



# 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, you can see 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 Cloudera 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.

New User

Username \*

enter username

First Name

enter first name

Last Name

enter last name

Password \*

enter password

Permissions

☒ Normal user - can access Cloudera Data Visualization site

☐ Admin user - have all permissions to site

Groups

Roles

Group Membership

Search

Partial groups are shown; please use the search box to search the full list of groups.

ave

☐ test group

☐ viz\_guest\_group

☐ vizcml-ro

☐ vizcml-rw

☐ Data Admin

☐ Marketing

☐ Test group

☐ Data Analyst

ADD >>

<<

Selected

Select options from the left

☐ Select All

New group name

+ ADD

CANCEL

SAVE

19

- Click ADD to move these groups to the right column, and then click SAVE.

In this process, you will not assign users to roles directly, but through the group membership only.

- 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. You 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"> <li>Data_Admins</li> <li>Marketing</li> </ul>
Kate_Marketing	<ul style="list-style-type: none"> <li>Analysts</li> <li>Marketing</li> </ul>
Lauren_Marketing	<ul style="list-style-type: none"> <li>Visual_Consumers</li> <li>Marketing</li> </ul>
Adele_Sales	<ul style="list-style-type: none"> <li>Data_Admins</li> <li>Sales</li> </ul>
Beyonce_Sales	<ul style="list-style-type: none"> <li>Analysts</li> <li>Sales</li> </ul>
Cher_Sales	<ul style="list-style-type: none"> <li>Visual_Consumers</li> <li>Sales</li> </ul>
Xuong_Operations	<ul style="list-style-type: none"> <li>Data_Admins</li> <li>Operations</li> </ul>
Yoneda_Operations	<ul style="list-style-type: none"> <li>Analysts</li> <li>Operations</li> </ul>
Zariski_Operations	<ul style="list-style-type: none"> <li>Visual_Consumers</li> <li>Operations</li> </ul>

### What to do next

After completing these steps, review the list of users to verify the assigned roles.

### Related Information

[Assigning groups to roles](#)