

Working with User Roles

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Creating new roles

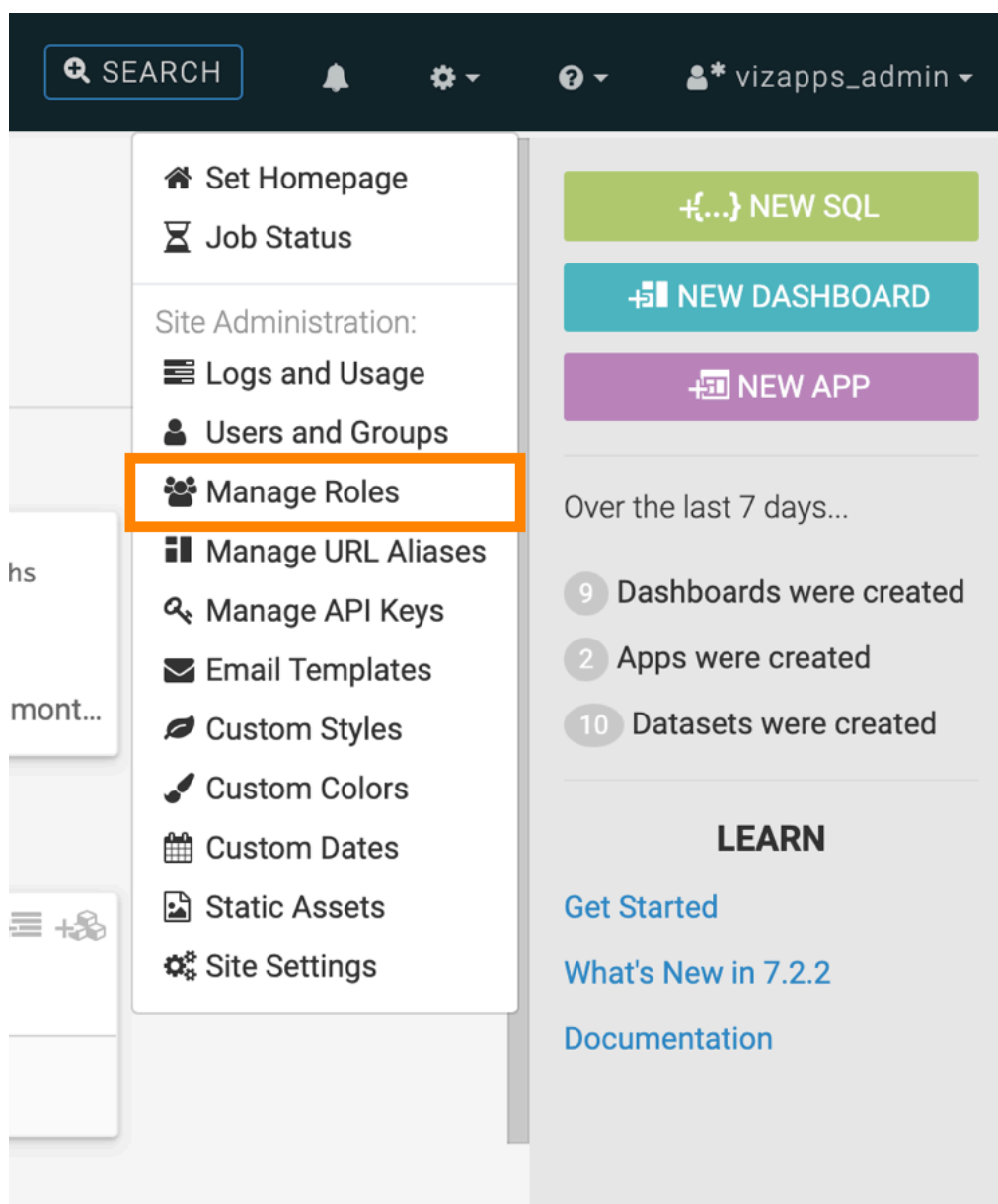
About this task

Administrators with Manage roles and users privilege can introduce new roles into the Role-Based Access Control (RBAC) system.

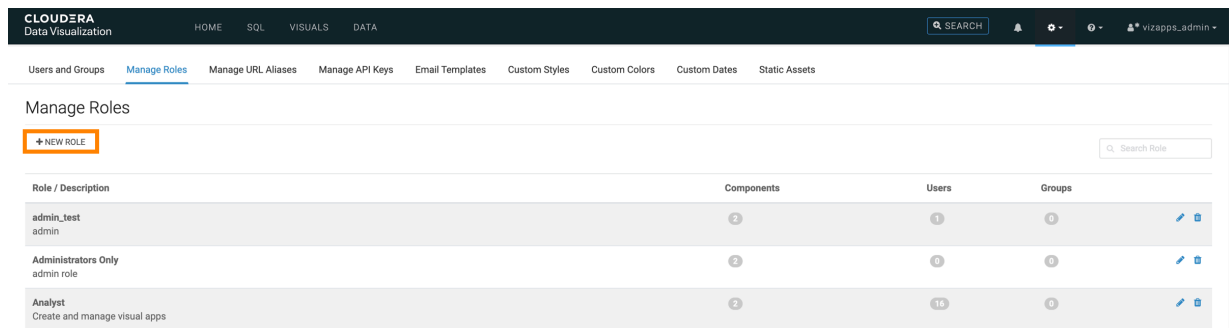
Follow these steps demonstrate to create a new role.

Procedure

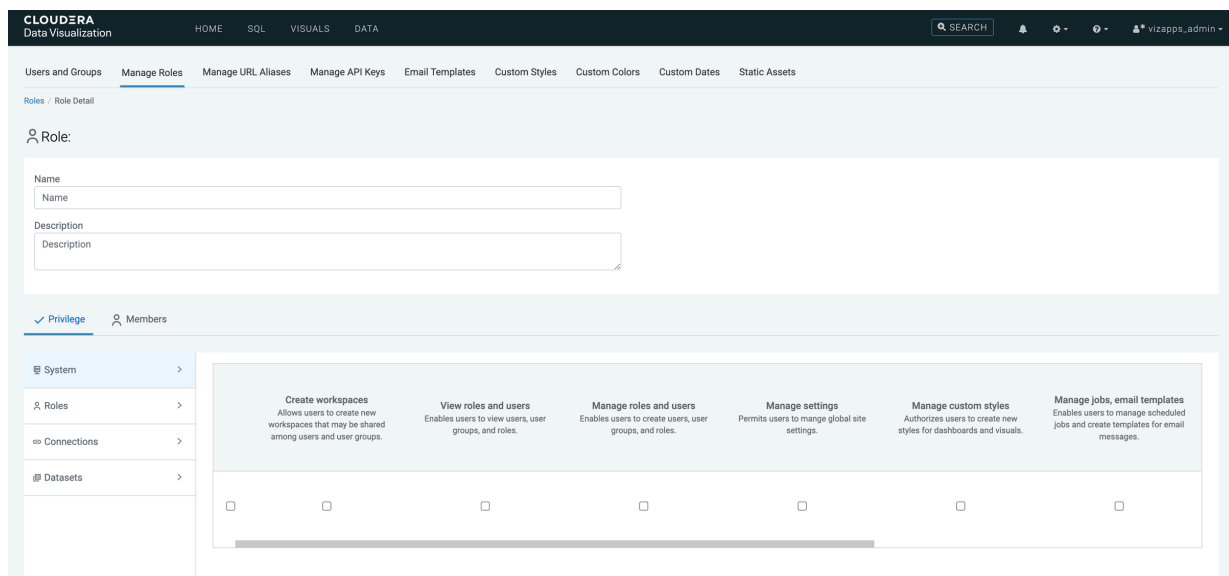
1. On the main navigation bar, click the (gear) icon.
2. In the drop-down menu, click Manage Roles.



3. Click NEW ROLE.



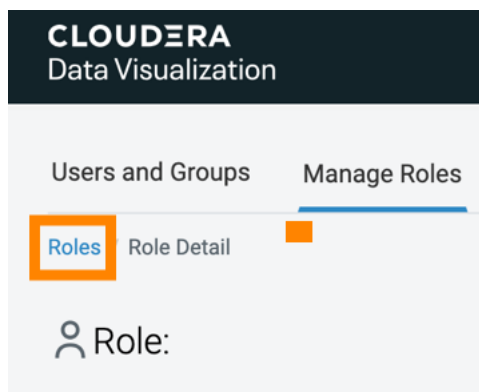
The Role Detail interface appears, open on the Privileges tab.



4. Define role details.

- Provide a distinctive name for the new role.
- In the Description field, briefly explain the purpose or context of the new role.
- Click APPLY CHANGES to save the role.

5. To ensure the role was successfully created, click Roles in the top left corner of the page.



The newly created role should now be visible in the role list.

What to do next

Proceed by defining *role privileges* and *editing role assignments* as needed for the newly created role.

Related Information[Editing role assignments](#)[Role privileges](#)

Adding privileges

Once you have defined a new role in the Role-Based Access Control (RBAC) system of Cloudera Data Visualization, you can start adding privileges to that role.

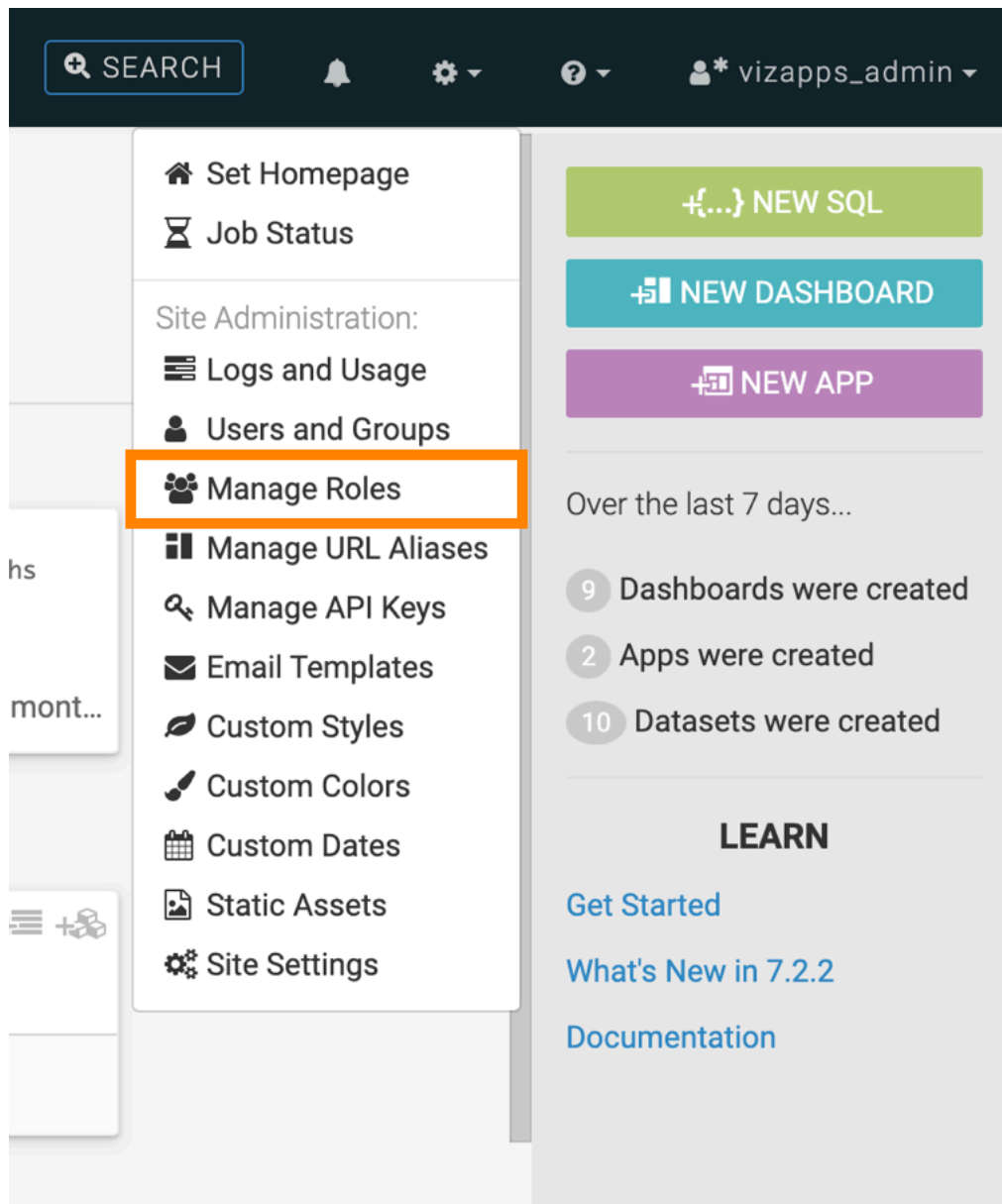
About this task

The following steps show you how to add or modify privileges associated with a specific role.

Procedure

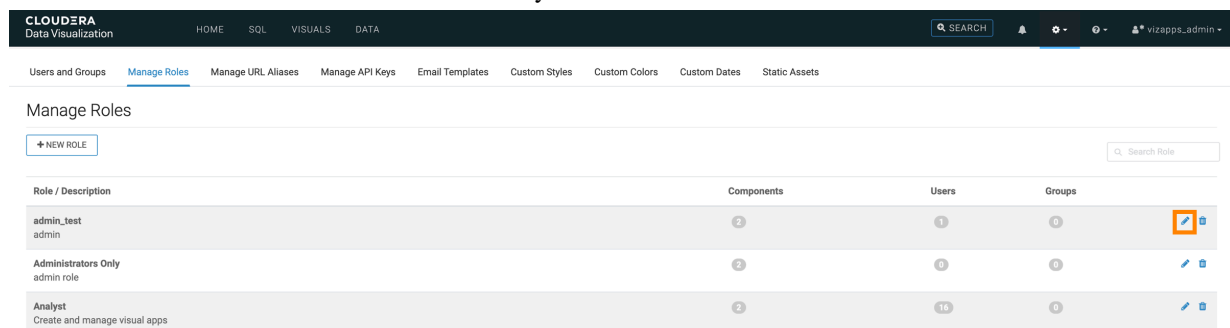
1. On the main navigation bar, click the (gear) icon.

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



- In the Manage Roles interface, locate the role you wish to edit and click on the (edit) icon next to the respective role.

You can use the Search Role box to find the role you want to edit.



4. On the Role Detail interface, you can set the following groups of privileges:

- *System privileges*
- *Role privileges*
- *Connection privileges*
- *Dataset privileges*

The screenshot shows the 'Role Detail' interface for 'Role Name Test'. The 'Manage Roles' tab is selected. The 'Role: Role Name Test' section has input fields for 'Name' (containing 'Role Name Test') and 'Description' (containing 'Description'). A sidebar on the left has a 'Privilege' tab selected, showing a tree view with 'System', 'Roles', 'Connections', and 'Datasets'. The main area displays a table of privileges with checkboxes for each.

Privilege	System	Roles	Connections	Datasets
Create workspaces Allows users to create new workspaces that may be shared among users and user groups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View roles and users Enables users to view users, user groups, and roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage roles and users Enables users to create users, user groups, and roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage settings Permits users to manage global site settings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage custom styles Authorizes users to create new styles for dashboards and visuals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage jobs, email templates Enables users to manage scheduled jobs and create templates for email messages.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. After configuring the desired privileges for the role, click **APPLY CHANGES** to save 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 Cloudera Data Visualization.

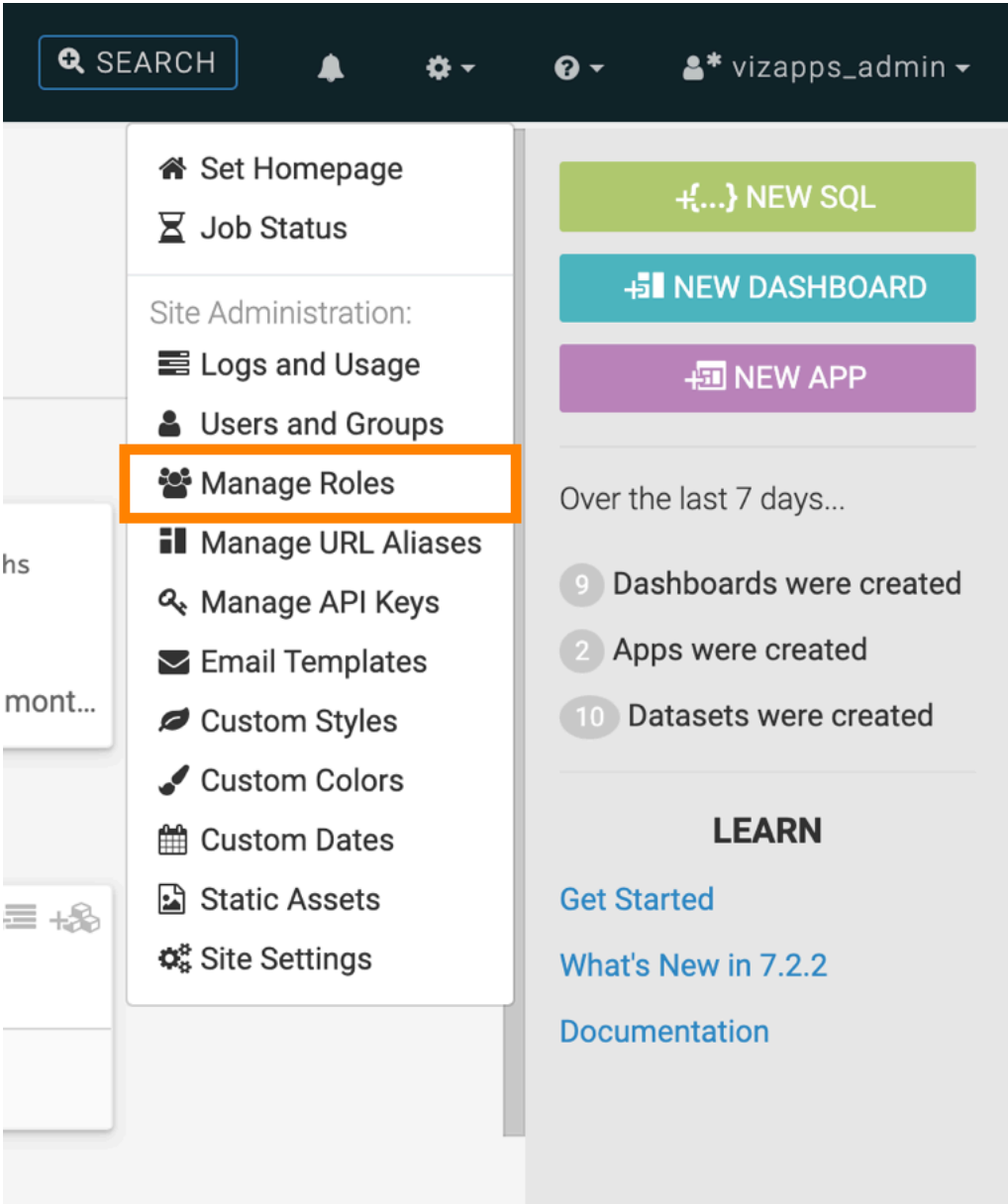
About this task

To configure system-level privileges for a role, follow the steps outlined below.

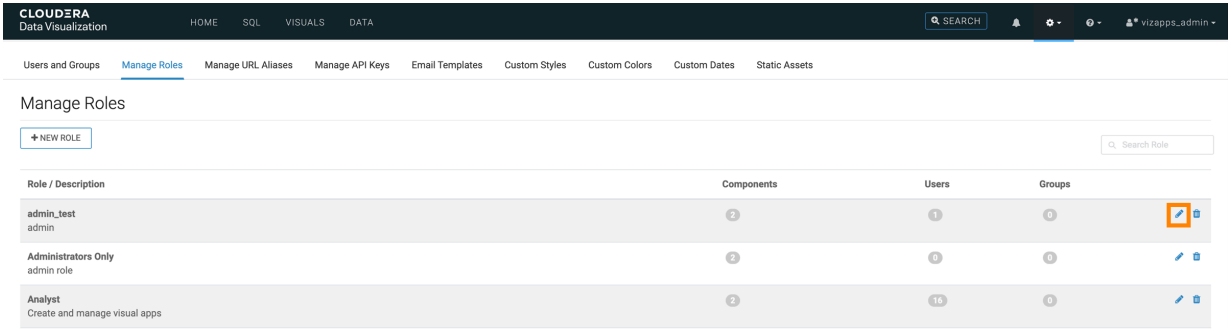
Procedure

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

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



- 3. In the Manage Roles interface, find the role you wish to edit and click on the (edit) icon next to the respective role. You can use the Search Role box to find the role you want to edit.



The Role Detail interface is displayed.

4. Locate the System category on the Privilege tab and select the checkboxes for the actions you want to permit for the role.

Click the Select all checkbox, next to the System category name if you want to activate all permissions.

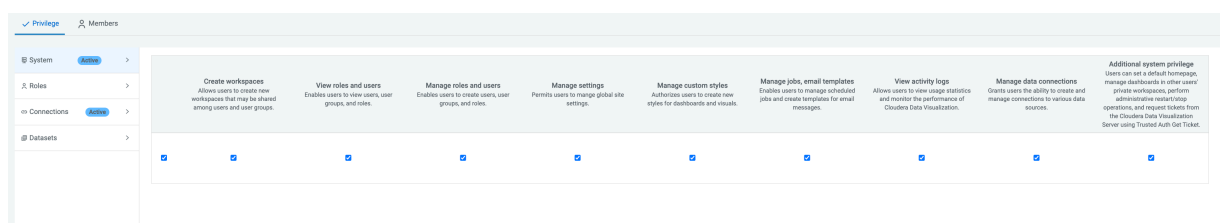
- Create workspaces
- View roles and users
- Manage roles and users
- Manage settings
- Manage custom styles
- Manage jobs, email templates
- View activity logs
- Manage data connections
- Additional system privilege



Note:

Privilege dependency information:

The View roles and users permission is mandatory if the privilege includes the Manage roles and users permission and cannot be removed. The checkboxes for these permissions are pre-filled and fixed. If Manage roles and users is deselected, the View roles and users permission becomes optional and can also be deselected.



5. Click APPLY CHANGES to save the changes made to the role.

What to do next

Once system privileges are configured, proceed to *setting role privileges*.

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

Related Information

[Setting role privileges](#)

[RBAC permissions](#)

Setting role privileges

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

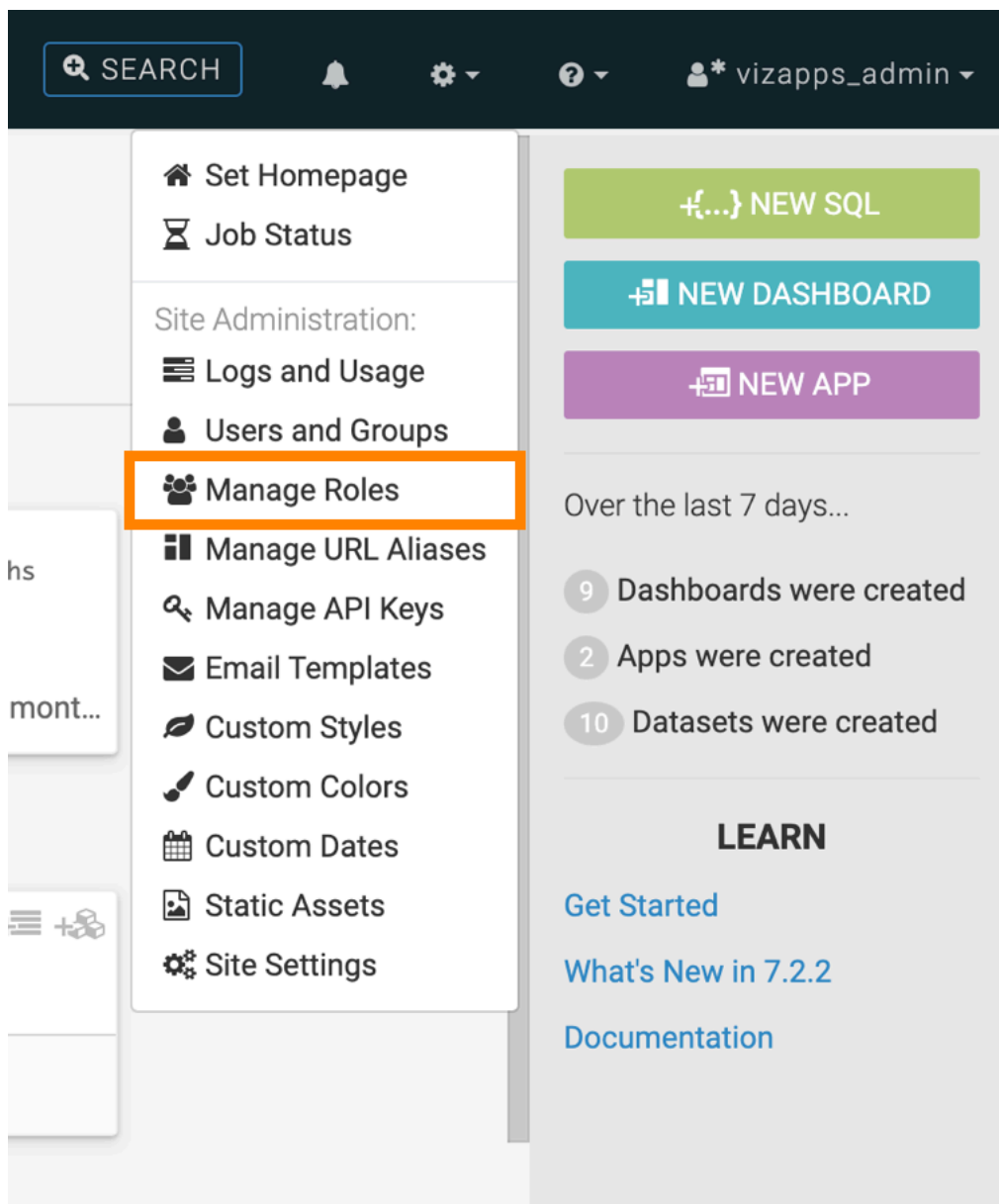
About this task

To add new role privileges to a role, follow the steps outlined below.

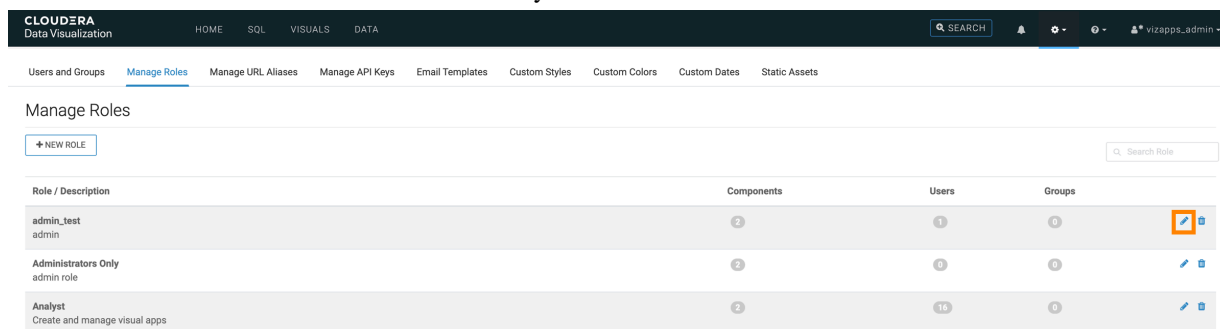
Procedure

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

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



- In the Manage Roles interface, find the role you wish to edit and click the (edit) icon next to the respective role.
You can use the Search Role box to find the role you want to edit.



The Role Detail interface is displayed.

- Switch to the Roles category on the Privilege tab.

5. Add a new role by clicking ADD ROLES.

The Add Role Privilege modal window appears.

6. Select the required role from the Roles drop-down list and add it.

When the role is added, by default, all possible privileges are marked for it.

You can repeat this step to add more roles to the list, if needed.

You can remove a role from the list by clicking the Delete icon.

7. Select the checkboxes for the actions that you want to permit for the role(s) you have added.

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



Note:

Privilege dependency information:

The Grant manage dashboards and Grant view dashboards permissions are mandatory if the privilege includes the Grant manage dataset permission and cannot be removed. The checkboxes for these permissions are pre-filled and fixed.

If Grant manage dataset is deselected, Grant manage dashboards becomes optional and can also be deselected. If Grant manage dashboards is deselected, Grant view dashboards becomes optional and can also be deselected.

8. After adding roles and selecting the appropriate role privileges, click **APPLY CHANGES**.

Role: admin_test

Name: admin_test

Description: admin

✓ Privilege | Members

System > Roles (Active) > Connections (Active) > Datasets >

⊕ ADD ROLES

	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.	
Test Role 1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Results

- The members assigned to the selected role can now grant dataset access based on the role-based privilege rows.
- The selections in the rows indicate the level of privileges each role receives. For example, Test Role 1 can grant Manage and View privileges to users.
- The dataset access permissions are granted to the roles defined on the component line.

What to do next

Proceed to *Setting connection privileges*.

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

Setting connection privileges

Connection privileges are integral components of the Role-Based Access Control (RBAC) system in Cloudera Data Visualization. These privileges can be configured uniformly across multiple connections or customized for each connection, based on specific business requirements.

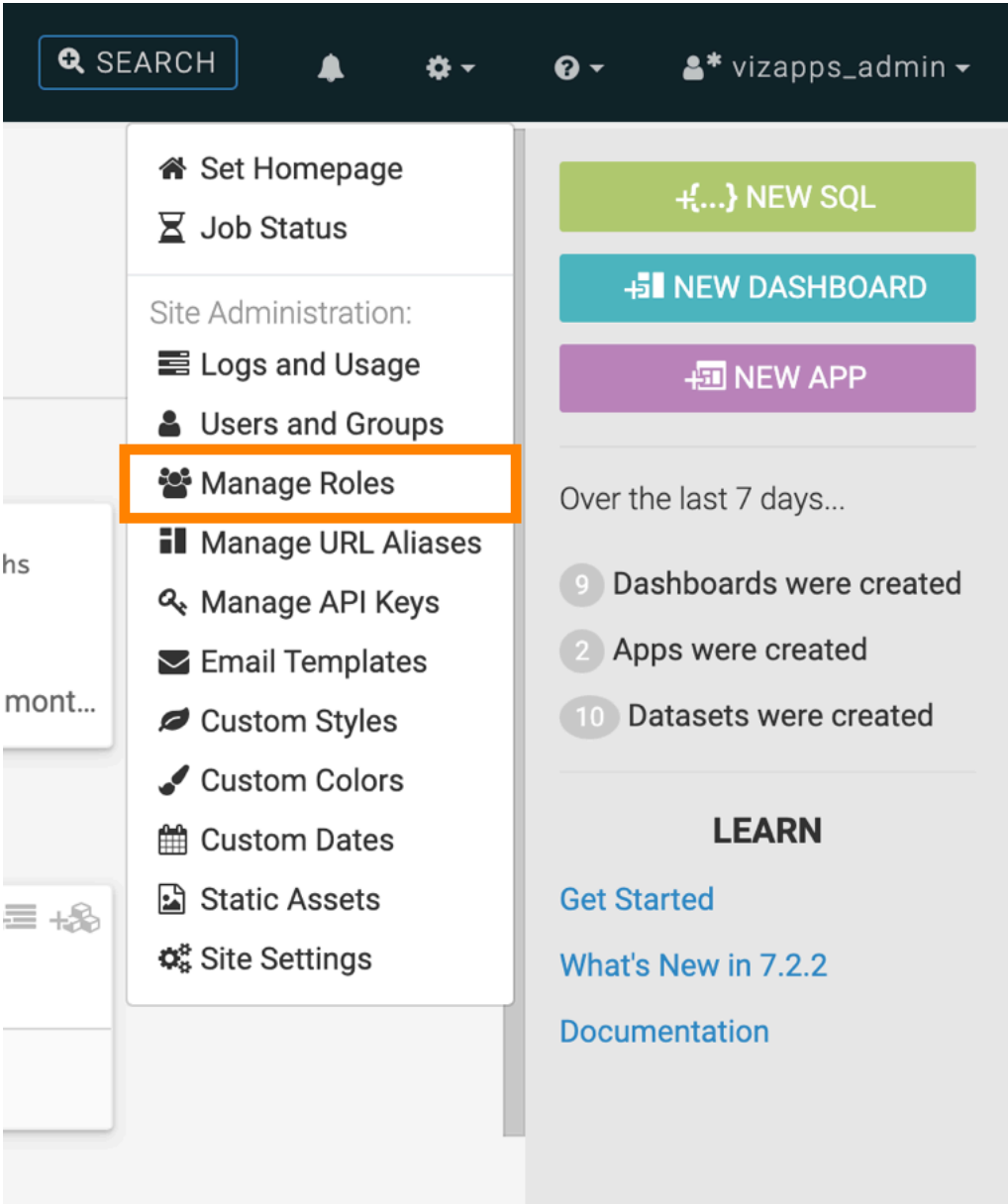
About this task

Follow the below steps to add connection-level privileges to a role, using "Test Role 1" as an example.

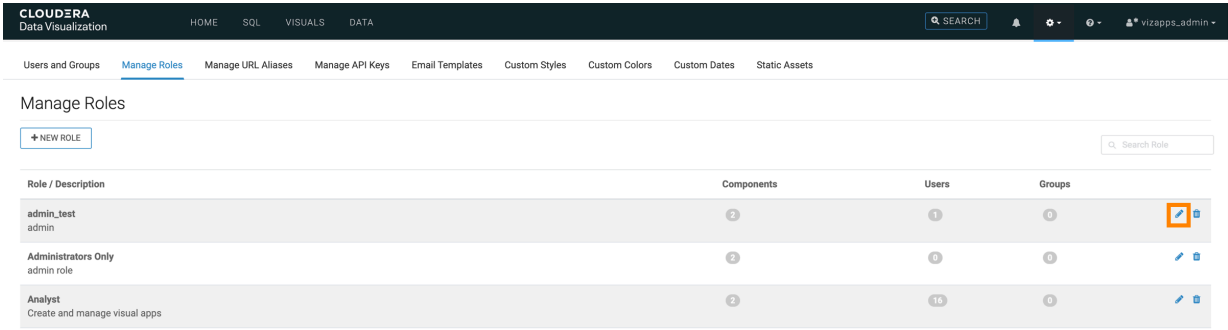
Procedure

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

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



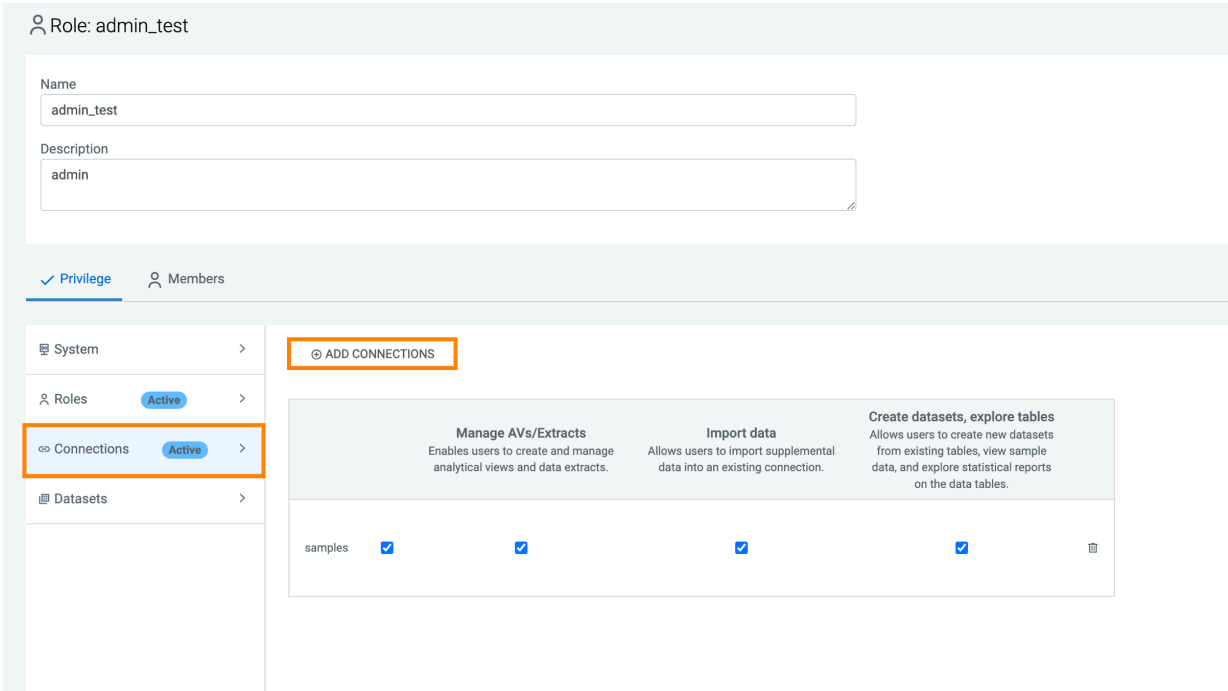
- 3. In the Manage Roles interface, find the role you wish to edit and click the (edit) icon next to the respective role.
You can use the Search Role box to find the role you want to edit.



The Role Detail interface is displayed.

- 4. Switch to the Connections category on the Privilege tab.

5. Add a new connection by clicking ADD CONNECTIONS.



The Add Data connection Privilege modal window appears.

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

When the connection is added, by default, all possible privileges are marked for it.

You can repeat this step to include additional connections if necessary.

You can remove a connection from the list by clicking the Delete icon.

7. Select the checkboxes for the actions that you want to permit for the connection(s) you have added.

- Manage AVs/Extracts
- Import data
- Create datasets, explore tables



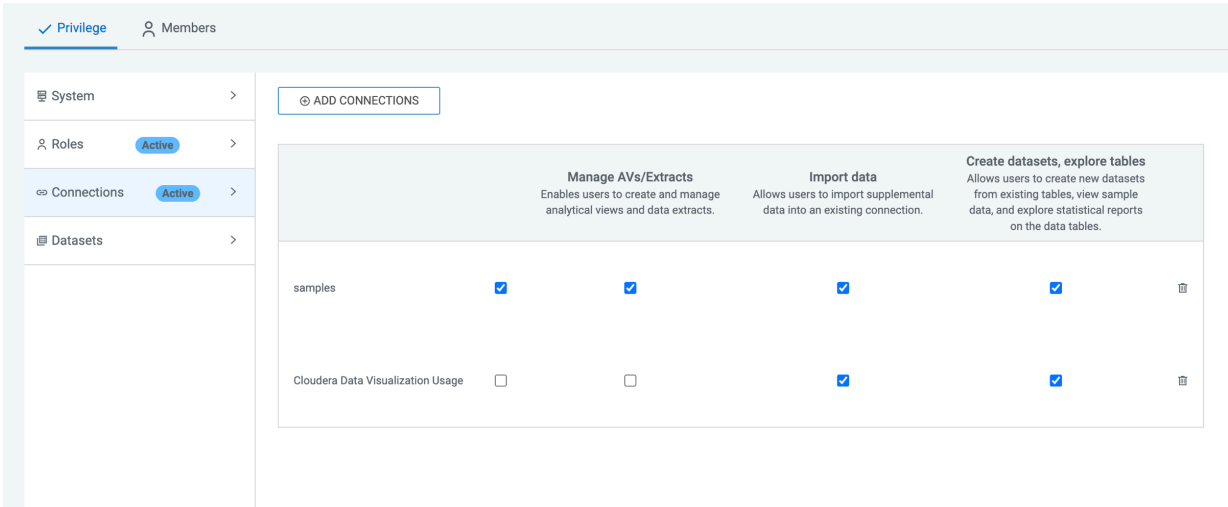
Note:

Privilege dependency information:

Manage AVs/Extracts and Import data are independent privileges, both including the Create datasets, explore tables permission. The Create datasets, explore tables is mandatory if the privilege contains the Manage AVs/Extracts or Import data Connections permission and cannot be removed. The checkboxes for these are pre-filled in and fixed.

If Manage AVs/Extracts is deselected, Create datasets, explore tables becomes optional and can also be deselected. Similarly, if Import data is deselected, it removes any connection-level access components, Create datasets, explore tables becomes optional and can also be deselected.

8. After adding roles and selecting the appropriate role privileges, click APPLY CHANGES.



What to do next

Proceed to *Setting dataset privileges*.

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

Related Information

[Setting dataset privileges](#)

[RBAC permissions](#)

Setting dataset privileges

Dataset privileges are integral components of the Role-Based Access Control (RBAC) system in Cloudera Data Visualization. These privileges enable fine-grained control over access to datasets, catering to specific business needs. They can be applied uniformly across multiple datasets or customized individually for each dataset.

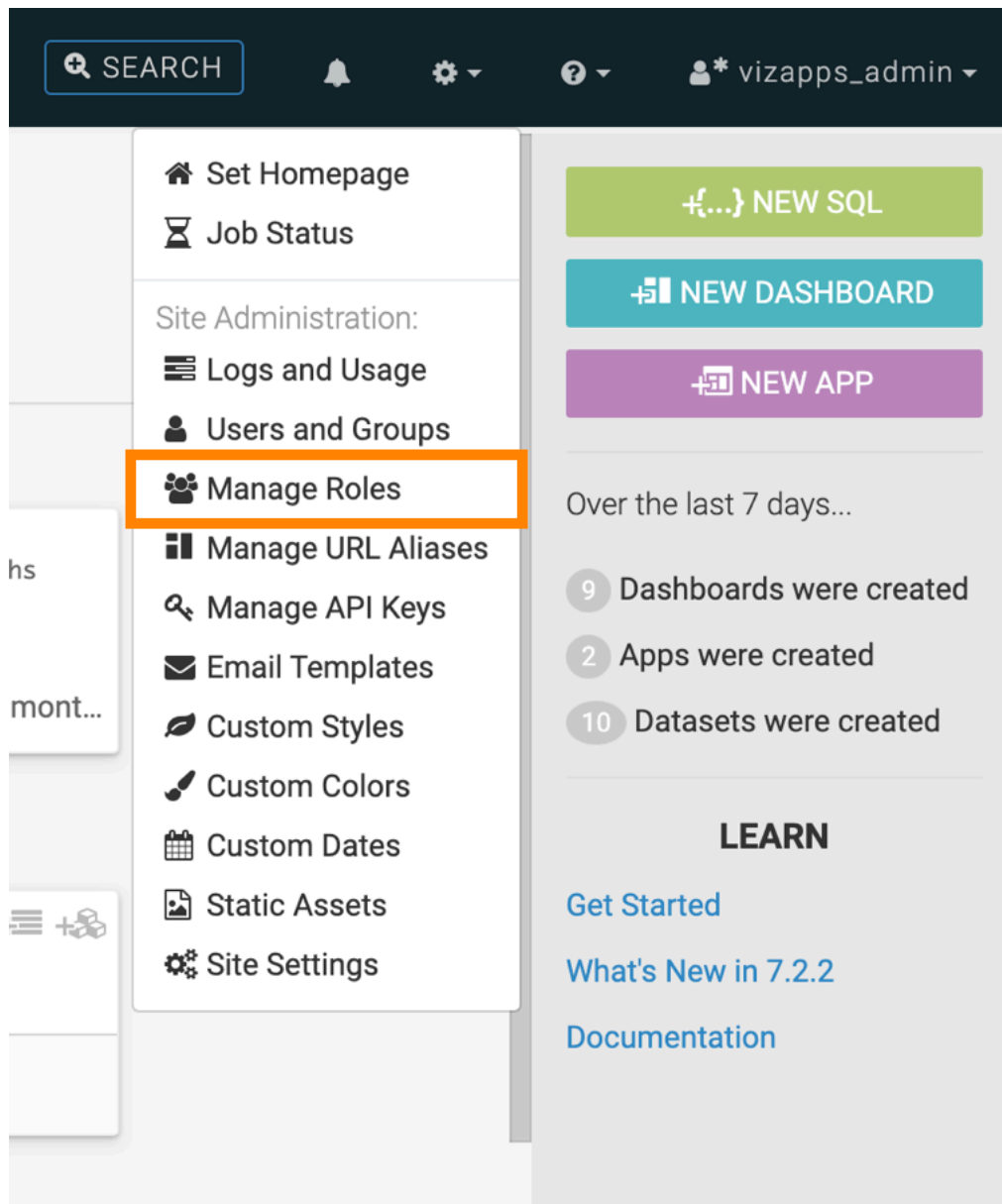
About this task

Follow these steps to add dataset-level privileges to a role using "Test Role 1" as an example.

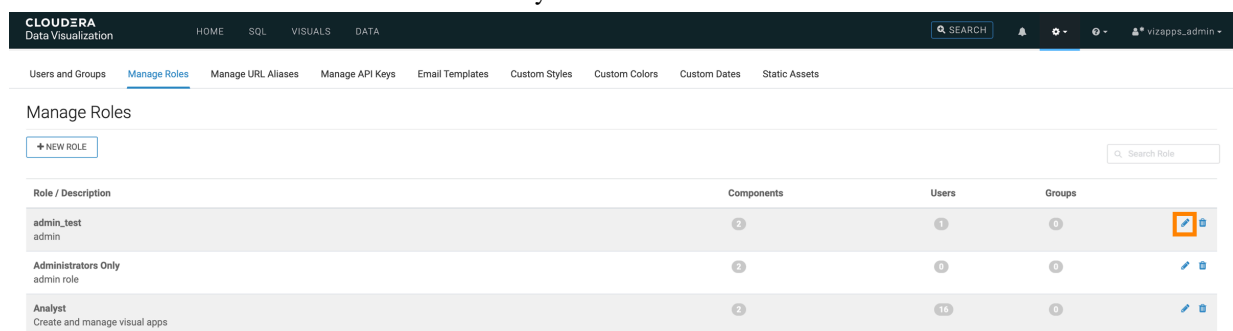
Procedure

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

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



- In the Manage Roles interface, find the role you wish to edit and click the (edit) icon next to the respective role. You can use the Search Role box to find the role you want to edit.



The Role Detail interface is displayed.

- Switch to the Datasets category on the Privilege tab.

5. Add a new dataset privilege by clicking ADD DATASETS.

The screenshot shows the 'Role: admin_test' configuration page. Under the 'Privilege' tab, the 'ADD DATASETS' button is highlighted with an orange box. The left sidebar shows a navigation menu with 'System', 'Roles' (Active), 'Connections' (Active), and 'Datasets' (highlighted with an orange box). The main content area displays three privilege options: 'Manage dataset' (allows users to change properties of datasets, create datasets over joined tables, modify fields), 'Manage dashboards' (enables users to create and modify visuals and dashboards), and 'View dashboards' (used to limit users to view-only privileges for visuals and dashboards, while denying edit privileges).

The Add Dataset Privilege modal window appears.

6. From the Connection(s) drop-down menu, select either All connections or one of the individual connections.
7. From the Datasets(s) drop-down menu, select either All datasets or specific datasets.

When the dataset is added, by default, all possible privileges are marked for it.

You can repeat this step to include additional connections if necessary.

You can remove a connection from the list by clicking the Delete icon.

8. Select the checkboxes for the actions that you want to permit for the connection(s) you have added.
 - Manage dataset
 - Manage dashboards
 - View dashboards



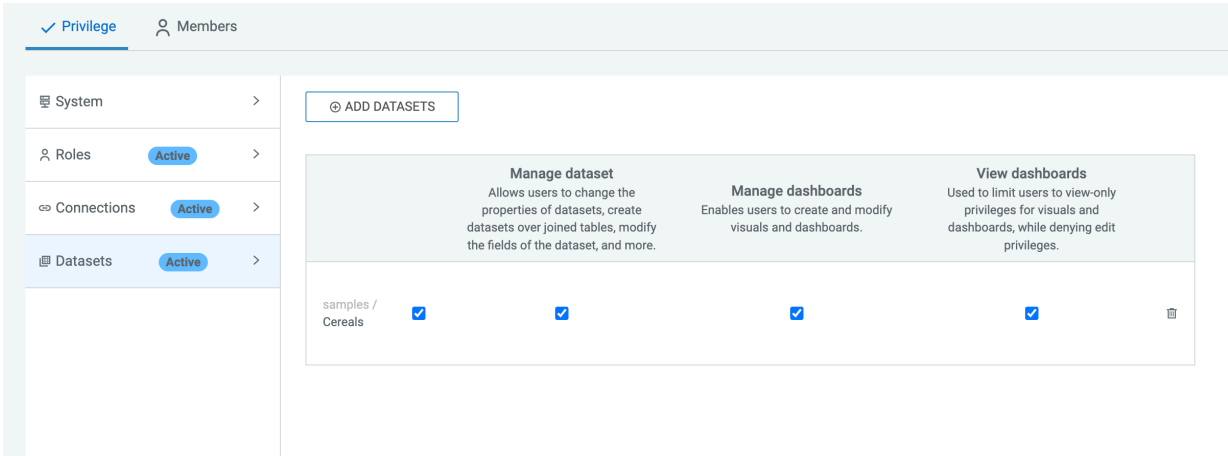
Note:

Privilege dependency information:

The Manage dashboards and View dashboards permissions are mandatory if the privilege includes the Manage dataset permission and cannot be removed. The checkboxes for these permissions are pre-filled and fixed.

If Manage dataset is deselected, Manage dashboards becomes optional and can also be deselected. If Manage dashboards is deselected, View dashboards becomes optional and can also be deselected.

9. After adding roles and selecting the appropriate role privileges, click APPLY CHANGES.



Results

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

Related Information

[RBAC permissions](#)

Editing role assignments

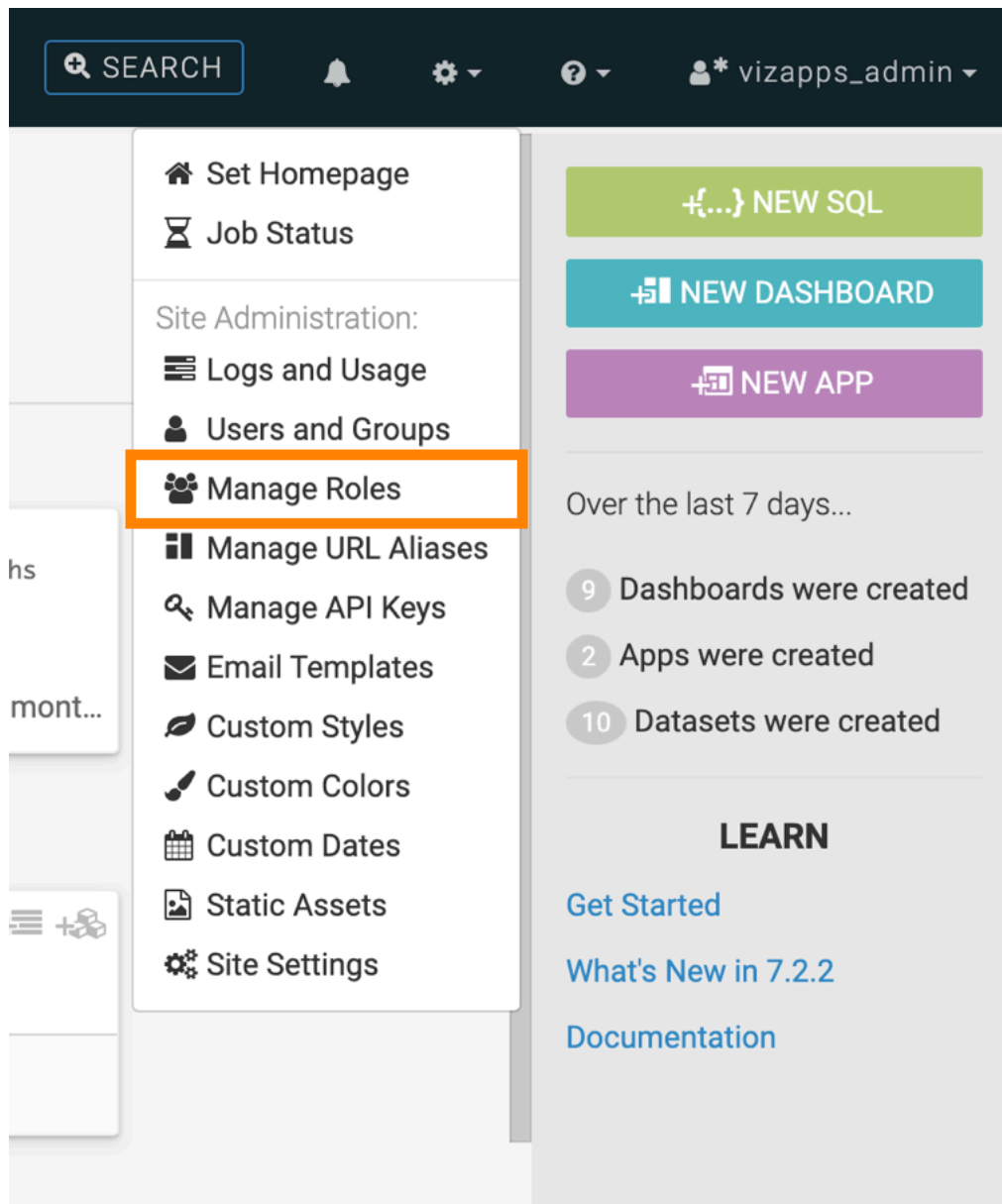
About this task

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*.

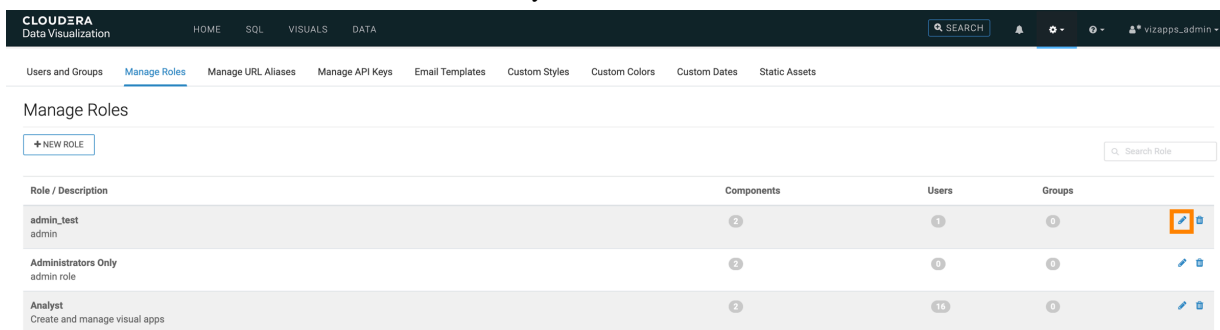
Procedure

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

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



3. In the Manage Roles interface, find the role you wish to edit and click the (edit) icon next to the respective role. You can use the Search Role box to find the role you want to edit.



The Role Detail interface is displayed.



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

4. Click the Members tab and proceed to editing 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

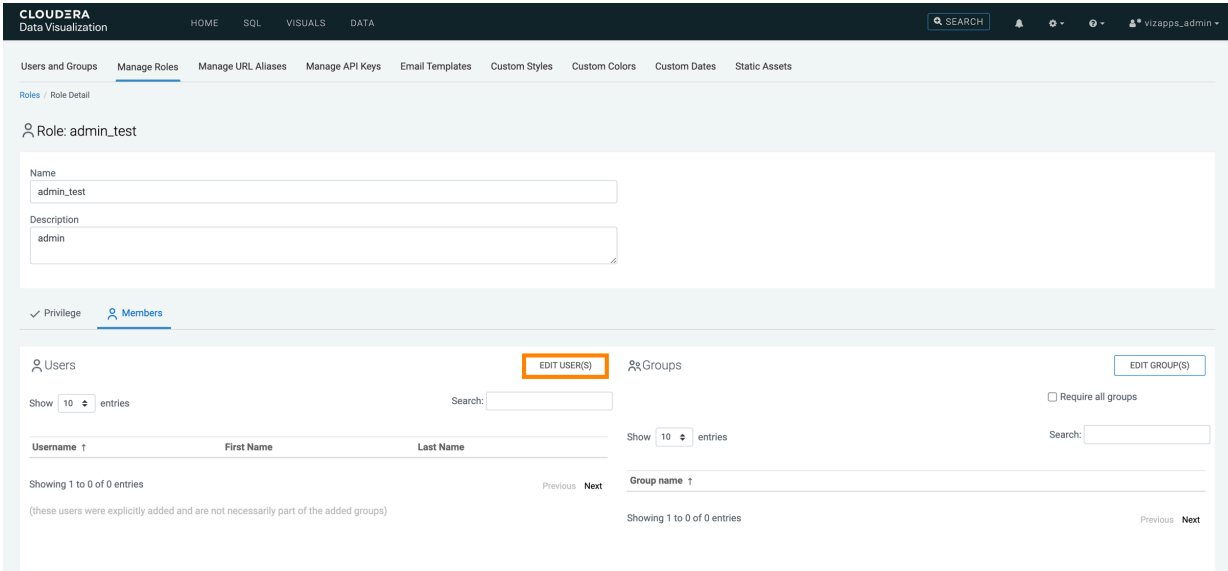
About this task

The following steps demonstrate how to add users to a role.

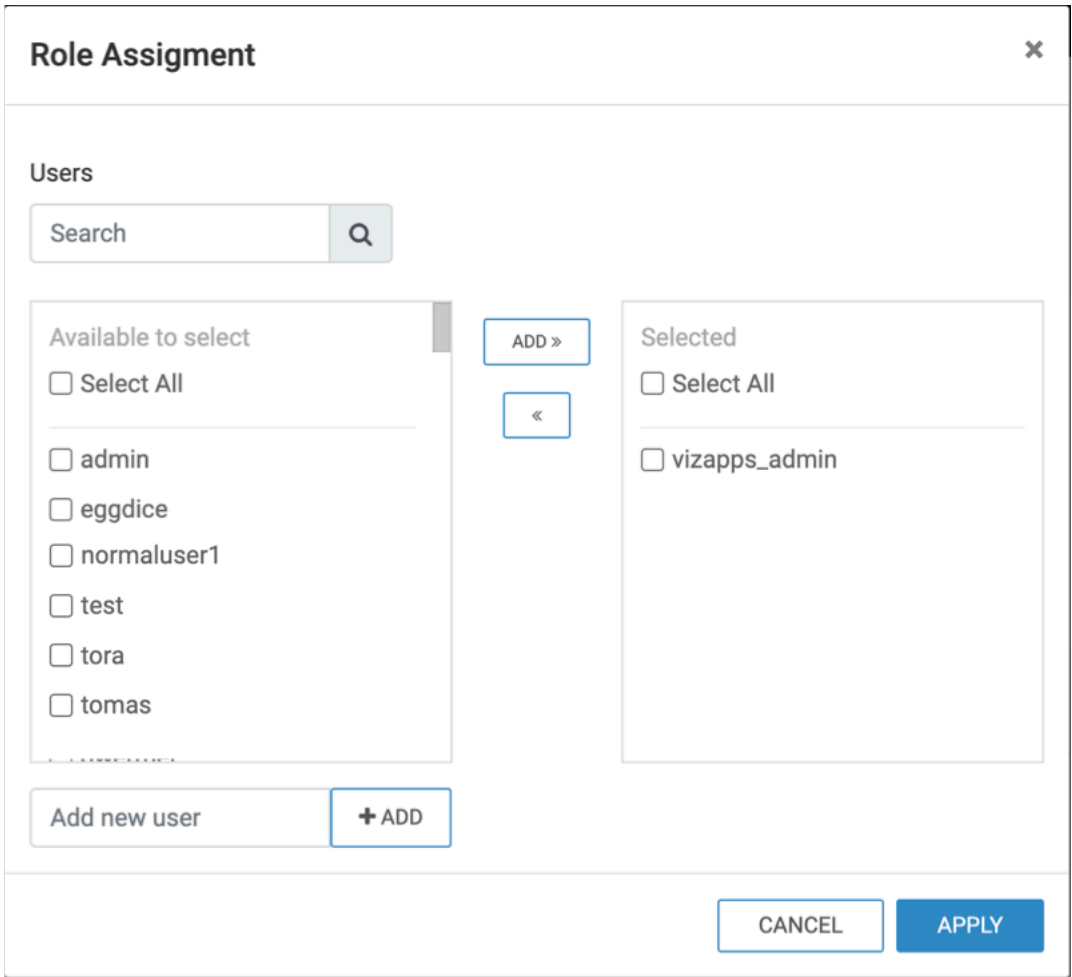
Procedure

1. Navigate to the Members tab of the Role Detail interface.

2. Click EDIT USER(S).



The Role Assignment modal window is displayed.



3. There are several options to add a user as a member:

- Search

If you have a long list of users in the Users section, use the Search box to find specific names, select them from the sub-list, and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Select

In the Users section, select the users to assign to the role and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Select All

To assign all users to Users, mark Select All and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Adding externally defined users (LDAP authentication)

The Role Assignment modal supports adding usernames that are not stored locally. For example, you can add known usernames available through LDAP authentication using this method.

Enter the new user name and click ADD>> to add externally defined users. After the new user name appears in the Users section, select it and click ADD>> to move the new user to the right side of the modal window.

When you are ready, click APPLY.

- Remove

To remove users from the Users list, select them from the right side panel and click <<.

When you are ready, click APPLY.

4. Click APPLY CHANGES.

The Users list is updated.

The screenshot shows the 'Role: admin_test' configuration page. The 'Members' tab is selected, displaying a list of users. The 'Users' section has a search bar and a table with columns: Username, First Name, and Last Name. The table contains three entries: 'admin', 'tora', and 'vizapps_admin'. The 'Groups' section is empty. The 'Users' section shows 'Showing 1 to 3 of 3 entries' and a note: '(these users were explicitly added and are not necessarily part of the added groups)'. The 'Groups' section shows 'Showing 1 to 0 of 0 entries'.

Username	First Name	Last Name
admin		
tora	Tori	Amundson
vizapps_admin		

Assigning roles to user groups

About this task

The following steps demonstrate how to add user groups to a role.

Procedure

1. Navigate to the Members tab of the Role Detail interface.

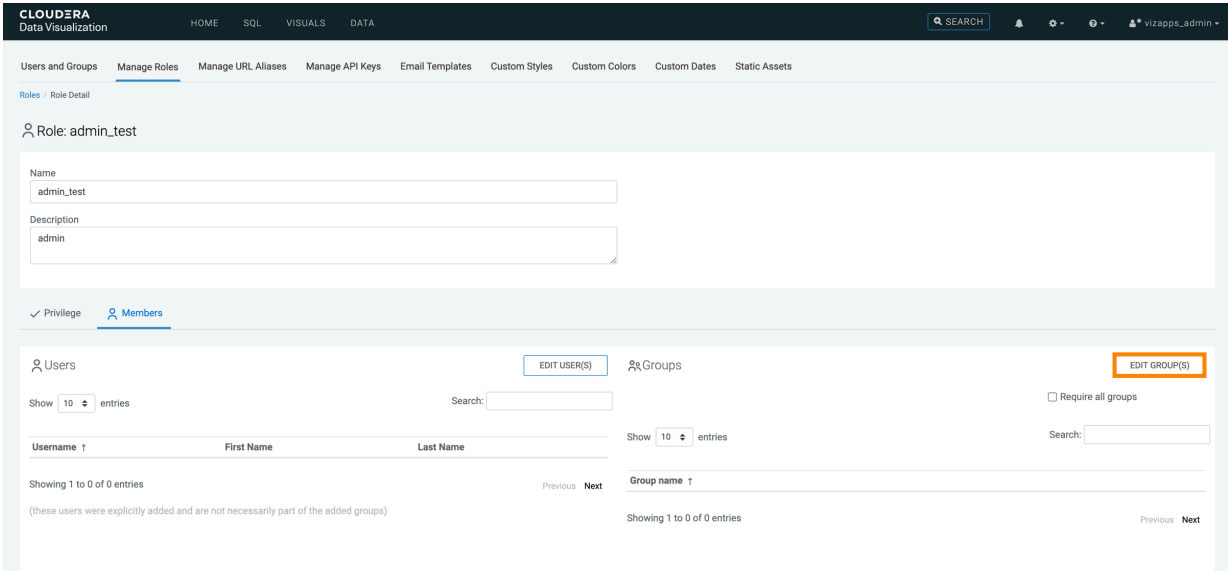
The Require all groups option ensures that only members of ALL groups listed in the role membership fields have the role's defined access. It determines whether members must belong to all listed groups or any one of them to access the role's privileges.



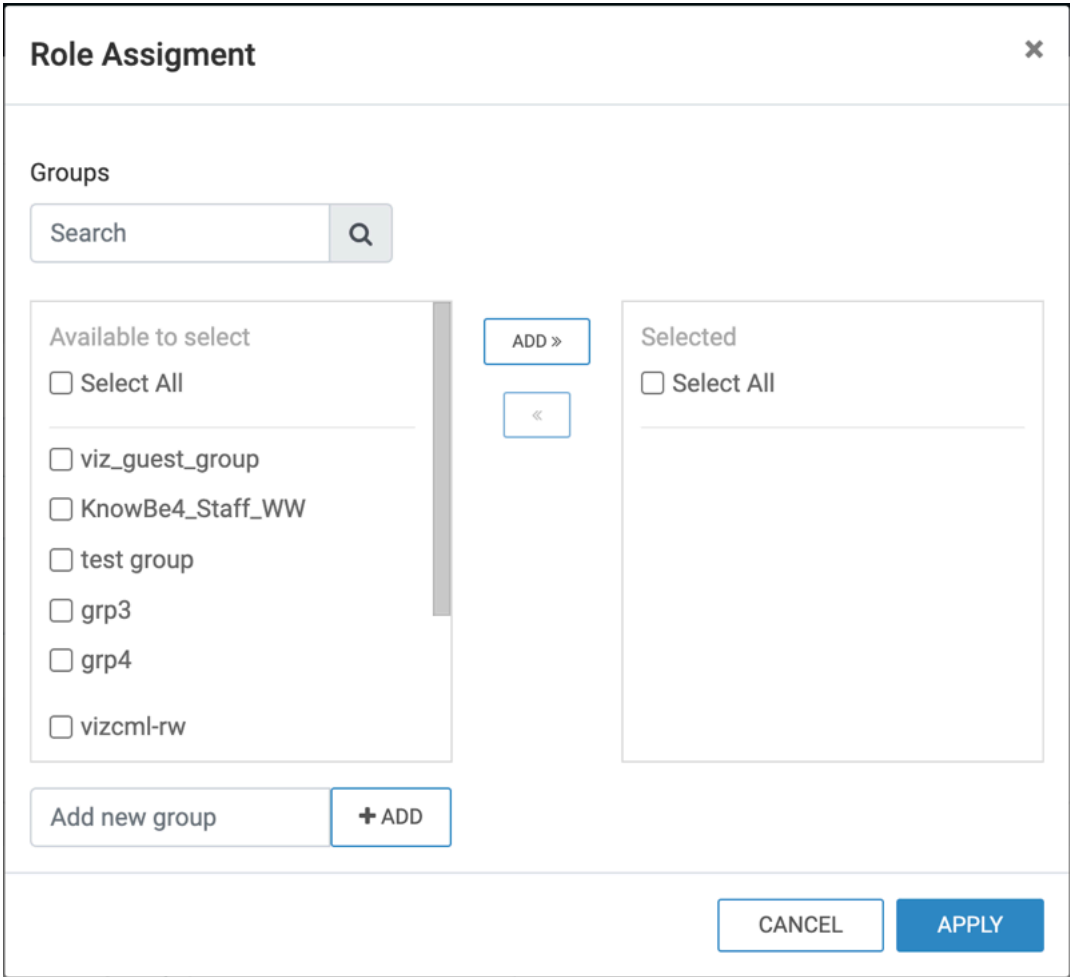
Note:

- If Require all groups is checked, only users belonging to both groups will receive the role's privileges.
- Exceptions to group membership include explicitly named users and users imported through Ranger groups.

2. Click EDIT GROUP(S).



The Role Assignment modal window is displayed.



3. There are several options to add groups to role membership:

- Search

If you have a long list of groups in the Groups section, use the Search box to find specific group names, select them from the sub-list, and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Select

In the Groups section, select the groups to assign to the role and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Select All

To assign all groups to Groups, mark Select All and click ADD>> to move them to the right side of the modal window.

When you are ready, click APPLY.

- Adding externally defined users (LDAP authentication)

The Role Assignment modal supports adding user groups to the list of assignees that are not stored locally. For example, you can add known groups available through LDAP authentication using this method.

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.

When you are ready, click APPLY.

- Remove

To remove users from the Members list, select them on the right side panel and click <<.

When you are ready, click APPLY.

4. Click APPLY CHANGES.

The Users list is updated.

The screenshot shows the 'Role: admin_test' configuration page. The 'Members' tab is selected, showing a list of groups. The 'test group' and 'viz_guest_group' are highlighted in the 'Groups' section, indicating they have been added to the role membership. The 'Users' section shows a list of users, but it is currently empty.

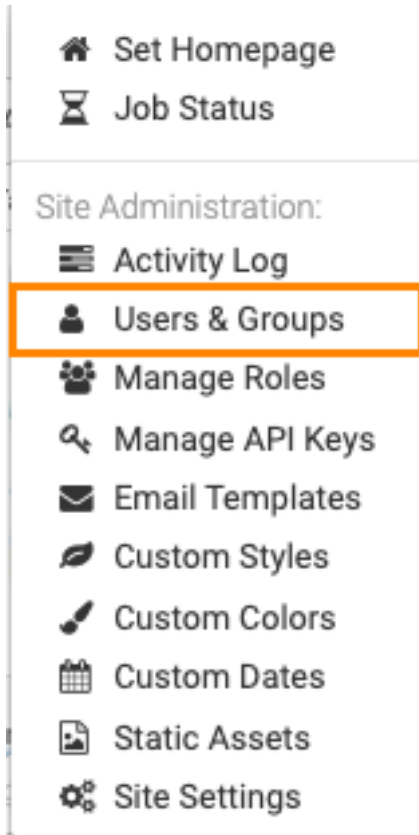
Assigning multiple roles to multiple users

About this task

The following steps demonstrate how to add multiple users to existing roles in the Users & Groups interface of Cloudera Data Visualization.

Procedure

1. Click the Gear icon on the main navigation bar.
2. In the drop-down menu, select Users & Groups.



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

- Choose the users you wish to assign to roles by selecting their respective checkboxes.

You can use the Search box to find the users you want to edit.

Manage Users and Groups REFRESH

NEW USER NEW GROUP

Users 3673 Groups 15

+ ADD TO GROUP + ADD TO ROLE DELETE

Show 10 entries Search:

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	▲
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	▲
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	▲
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	▲
<input checked="" type="checkbox"/> CArep1	Normal	a year ago	a year ago	SalesReps		▲
<input checked="" type="checkbox"/> CArep2	Normal	a year ago	a year ago	SalesReps		▲
<input type="checkbox"/> NormalUser	Normal	2 months ago	2 months ago		Test Role 1	!
<input checked="" type="checkbox"/> NVrep1	Normal	a year ago	a year ago	SalesReps		▲
<input checked="" type="checkbox"/> ORrep1	Normal	a year ago	a year ago	SalesReps		▲
<input type="checkbox"/> SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	▲
<input checked="" type="checkbox"/> WArepl	Normal	a year ago	a year ago	SalesReps		▲

Showing 1 to 11 of 11 entries

- Click ADD TO ROLE.

Manage Users & Groups

NEW USER NEW GROUP

Users 11 Groups 4

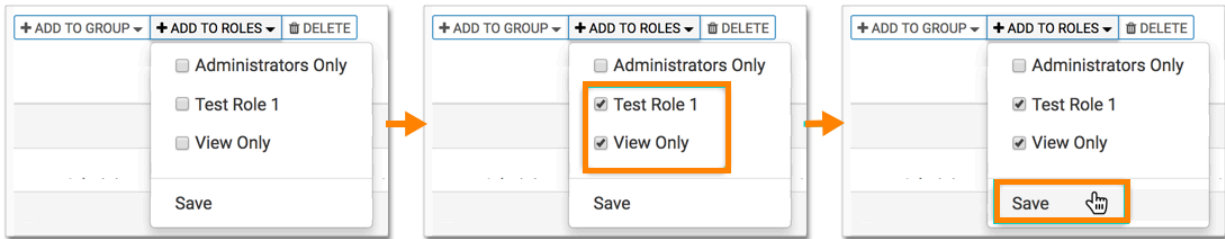
+ ADD TO GROUP + ADD TO ROLES DELETE

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	▲
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	▲
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	▲
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	▲
<input checked="" type="checkbox"/> CArep1	Normal	a year ago	a year ago	SalesReps		▲
<input checked="" type="checkbox"/> CArep2	Normal	a year ago	a year ago	SalesReps		▲
<input type="checkbox"/> NormalUser	Normal	2 months ago	2 months ago		Test Role 1	!
<input checked="" type="checkbox"/> NVrep1	Normal	a year ago	a year ago	SalesReps		▲
<input checked="" type="checkbox"/> ORrep1	Normal	a year ago	a year ago	SalesReps		▲
<input type="checkbox"/> SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	▲
<input checked="" type="checkbox"/> WArepl	Normal	a year ago	a year ago	SalesReps		▲

Showing 1 to 11 of 11 entries

A drop-down menu is displayed, showing a list of available roles.

5. Check the checkboxes next to the roles you want to assign to the selected users and click Save.



Results

You can see the changes to the information in the Users & Groups interface.

CLUSTER DATA VISUALIZATION

HOME SQL VISUALS DATA

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

NEW USER NEW GROUP

Users 11 Groups 4

ADD TO GROUP ADD TO ROLES DELETE


	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status	
<input type="checkbox"/>	admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A	
<input type="checkbox"/>	Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A	
<input type="checkbox"/>	ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A	
<input type="checkbox"/>	ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A	
<input type="checkbox"/>	CArep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A	
<input type="checkbox"/>	CArep2	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A	
<input type="checkbox"/>	NormalUser	Normal	2 months ago	2 months ago		Test Role 1	I	
<input type="checkbox"/>	NVrep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A	
<input type="checkbox"/>	ORrep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A	
<input type="checkbox"/>	SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A	
<input type="checkbox"/>	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 role in the role-based access control (RBAC) system is a straightforward process that helps maintain access control efficiency.

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.

Procedure

1. In the Manage Roles interface, identify the role you wish to delete from the list of existing roles.

You can use the Search Role box to find the role you want to delete.

The screenshot shows the 'Manage Roles' page in the Cloudera Data Visualization interface. At the top, there's a navigation bar with 'HOME', 'SQL', 'VISUALS', and 'DATA'. Below it, a sub-navigation bar includes 'Users and Groups', 'Manage Roles' (active), 'Manage URL Aliases', 'Manage API Keys', 'Email Templates', 'Custom Styles', 'Custom Colors', 'Custom Dates', and 'Static Assets'. The main content area is titled 'Manage Roles' and features a '+ NEW ROLE' button and a 'Search Role' input field. A table lists the following roles:

Role / Description	Components	Users	Groups	
admin_test admin	3	0	2	
Administrators Only admin role	2	0	0	
Analyst Create and manage visual apps	2	16	0	



Note: Ensure that the role you are deleting is no longer required and does not impact any ongoing access control configurations.

2. Click the Trash can icon located next to the role.

A Delete Confirmation modal window will appear, requesting confirmation for the deletion.

3. Click DELETE.

Related Information

[Creating new roles](#)