Cloudera Data Visualization 8.0.9

Working with User Roles

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Cloudera Data Visualization Creating new roles

Creating new roles

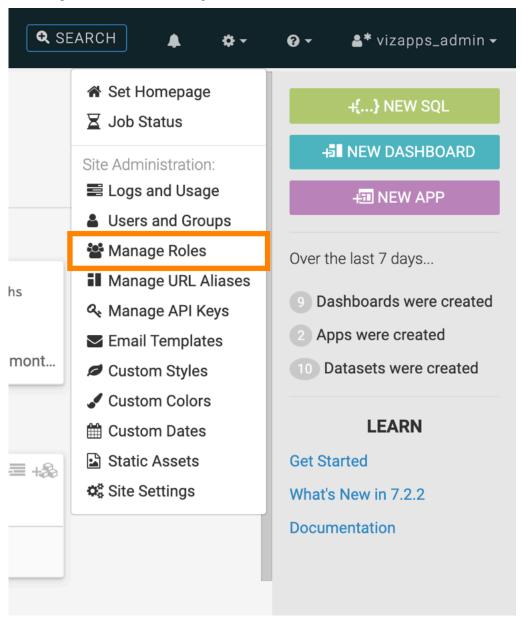
About this task

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.

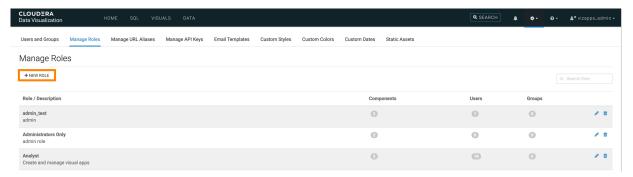
Procedure

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

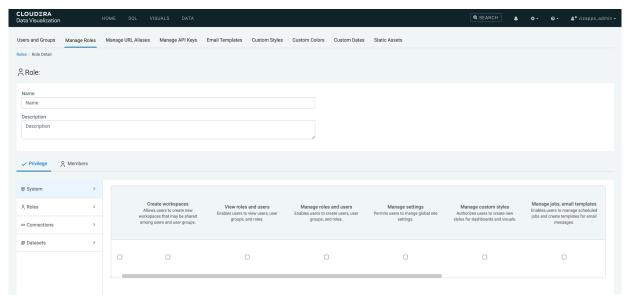


Cloudera Data Visualization Creating new roles

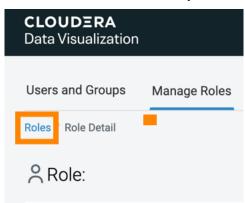
3. Click NEW ROLE.



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



- 4. Define role details.
 - a) Provide a distinctive name for the new role.
 - b) In the Description field, briefly explain the purpose or context of the new role.
 - c) 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.

Cloudera Data Visualization Adding privileges

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

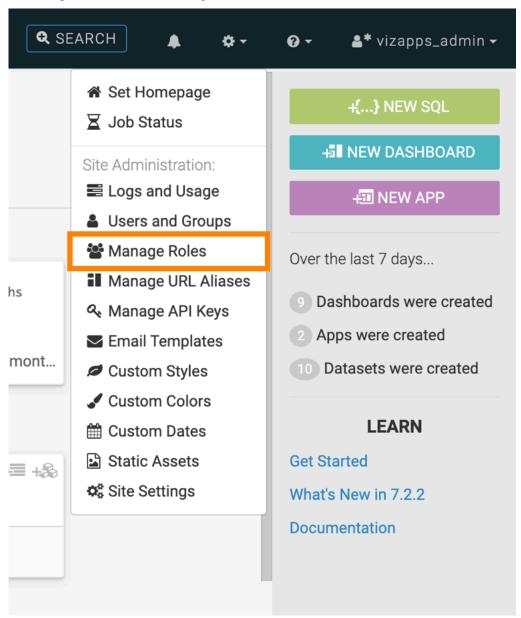
The following steps show you how to add or modify privileges associated with a specific role.

Procedure

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

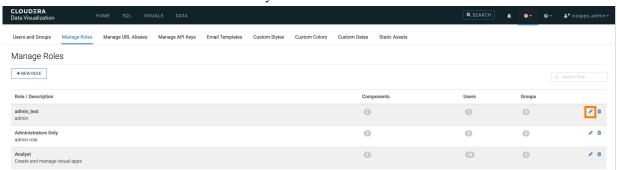
Cloudera Data Visualization Adding privileges

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



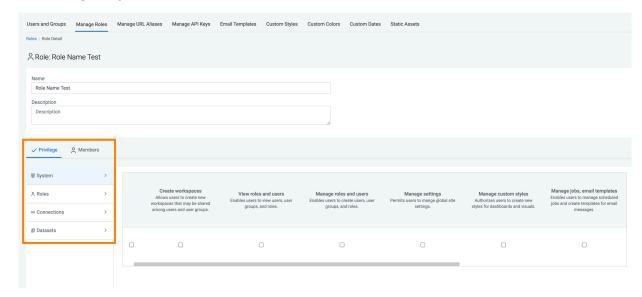
3. In the Manage Roles interface, locate the role you wish to edit and click on the (edit) icon next to the respective role.

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



Cloudera Data Visualization Setting system privileges

- **4.** On the Role Detail interface, you can set the following groups of privileges:
 - System privileges
 - Role privileges
 - Connection privileges
 - · Dataset privileges



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

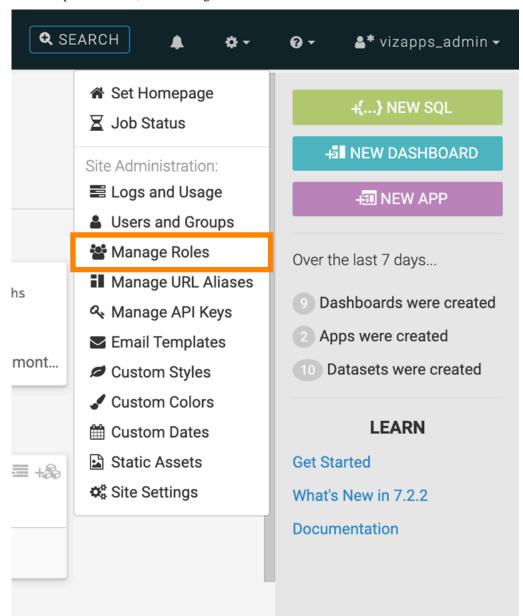
To configure system-level privileges for a role, follow the steps outlined below.

Procedure

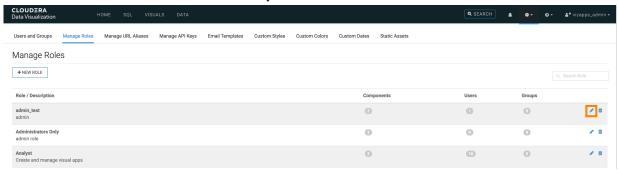
1. On the main navigation bar, click the (gear) icon.

Cloudera Data Visualization Setting system privileges

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.

Cloudera Data Visualization Setting role privileges

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

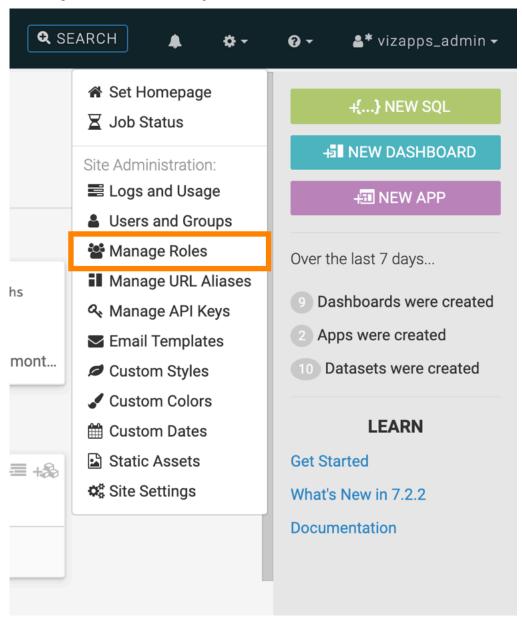
To add new role privileges to a role, follow the steps outlined below.

Procedure

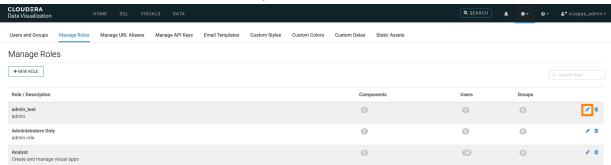
1. On the main navigation bar, click the (gear) icon.

Cloudera Data Visualization Setting role privileges

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.

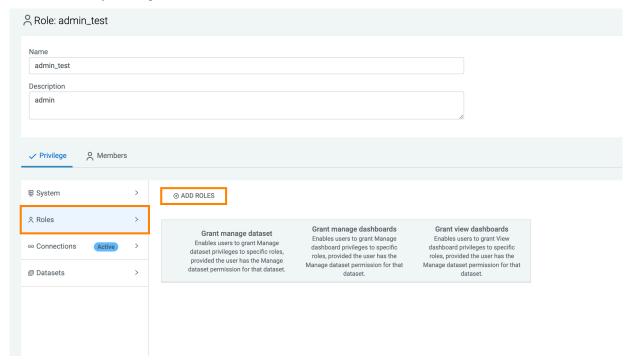


The Role Detail interface is displayed.

4. Switch to the Roles category on the Privilege tab.

Cloudera Data Visualization Setting role privileges

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



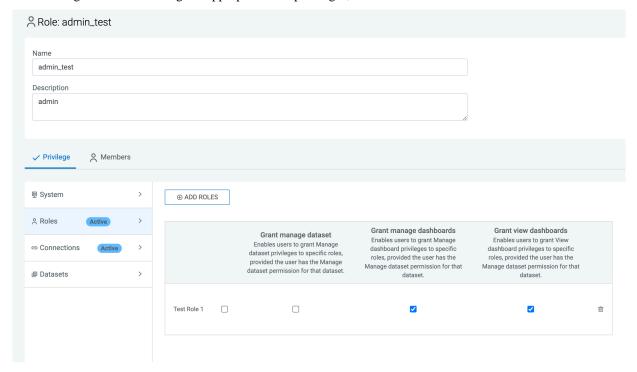
Note:

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.



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 Visualizationn. These privileges can be configured uniformly across multiple connections or customized for each connection, based on specific business requirements.

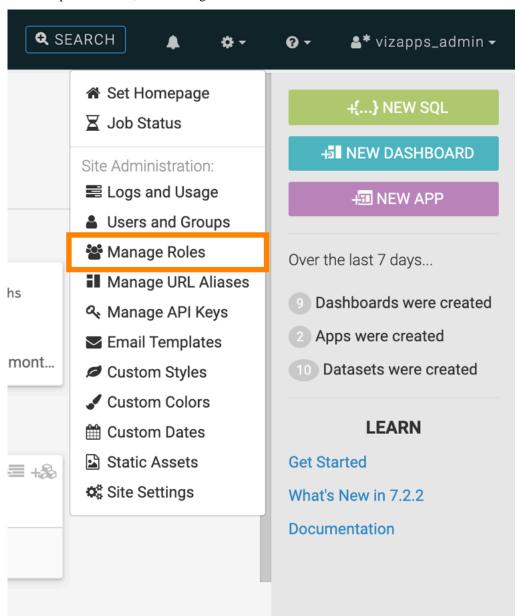
About this task

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

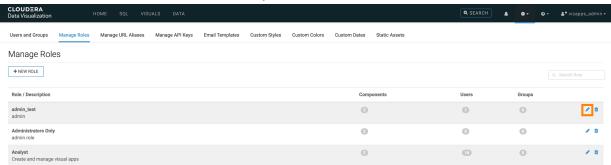
Procedure

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

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



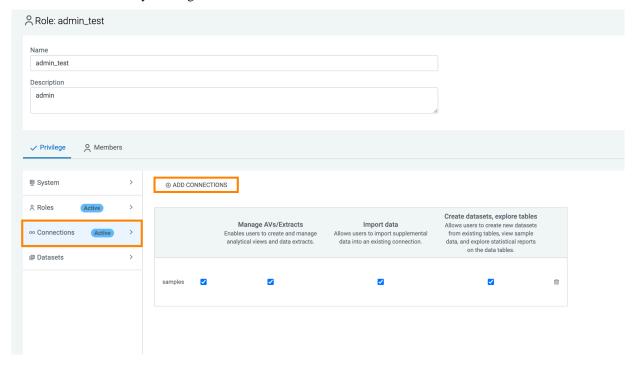
3. In the Manage Roles interface, find the role you wish to edit and click the (edit) icon next to the respective role. You can use the Search Role box to find the role you want to edit.



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:

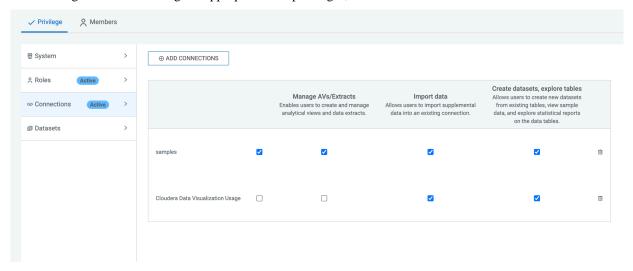
Privilege dependency information:

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.

Cloudera Data Visualization Setting dataset privileges

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

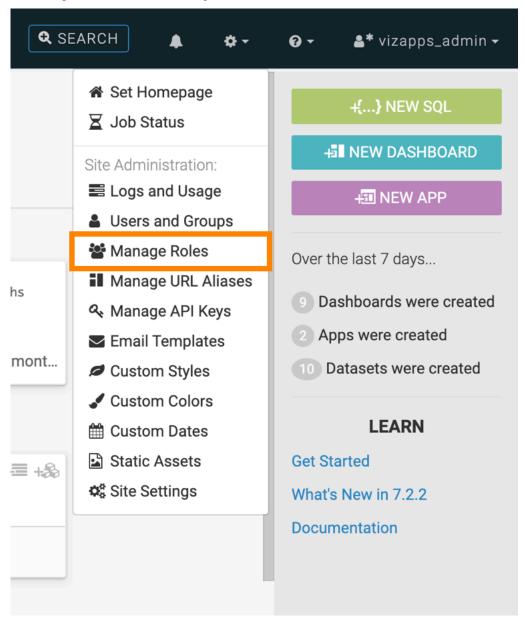
Follow these steps to add dataset-level privileges to a role using "Test Role 1" as an example.

Procedure

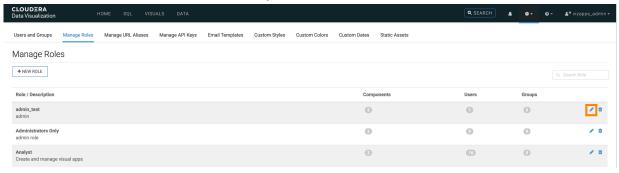
1. On the main navigation bar, click the (gear) icon.

Cloudera Data Visualization Setting dataset privileges

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.

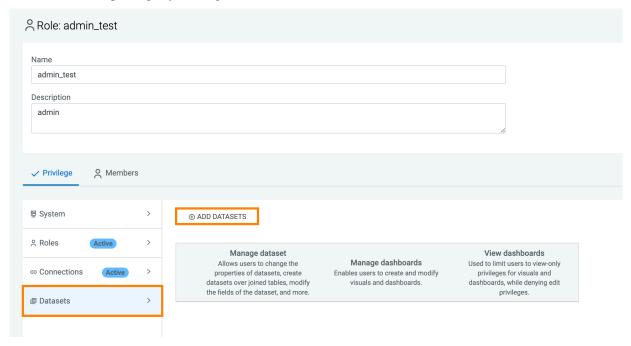


The Role Detail interface is displayed.

4. Switch to the Datasets category on the Privilege tab.

Cloudera Data Visualization Setting dataset privileges

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



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:

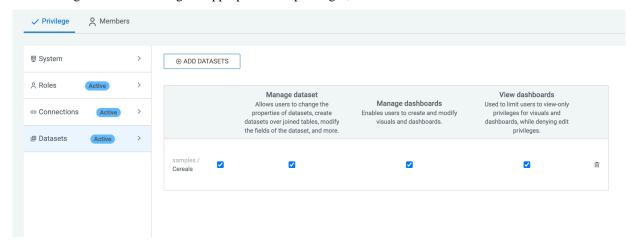
Privilege dependency information:

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.

Cloudera Data Visualization Editing role assignments

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.

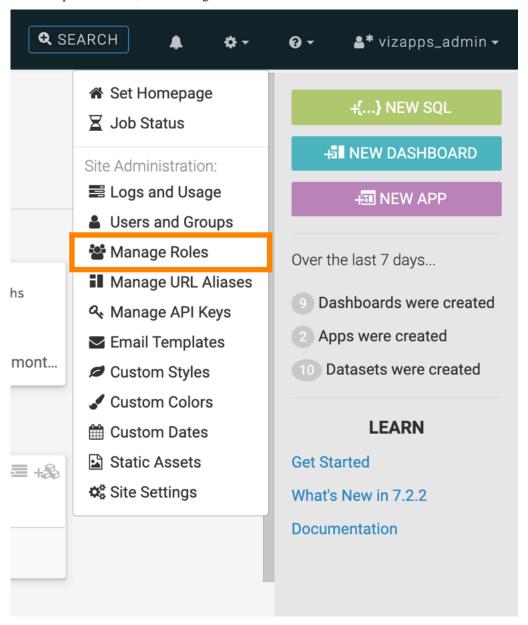
In this example, Test Role 1 is used, which was previously defined in Creating new roles.

Procedure

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

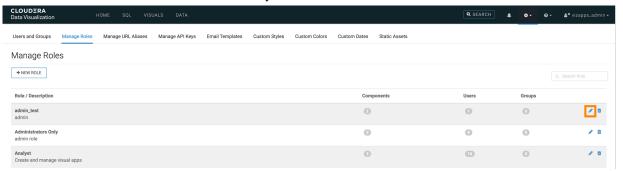
Cloudera Data Visualization Editing role assignments

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



Cloudera Data Visualization Assigning roles to users

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

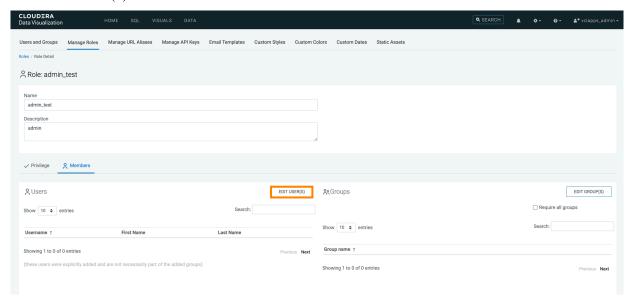
The following steps demonstrate how to add users to a role.

Procedure

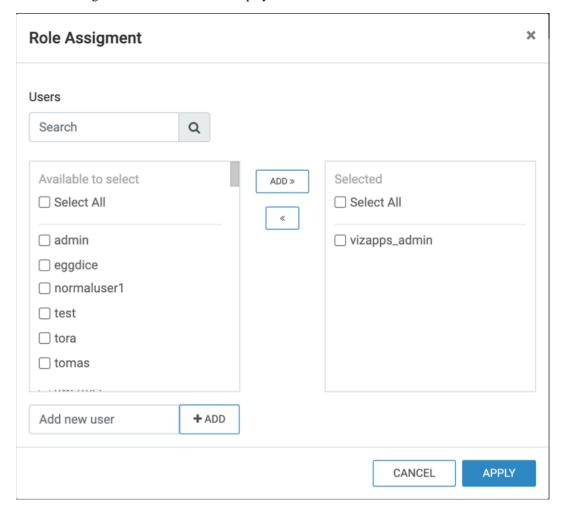
1. Navigate to the Members tab of the Role Detail interface.

Cloudera Data Visualization Assigning roles to users

2. Click EDIT USER(S).



The Role Assignment modal window is displayed.



Cloudera Data Visualization Assigning roles to users

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.

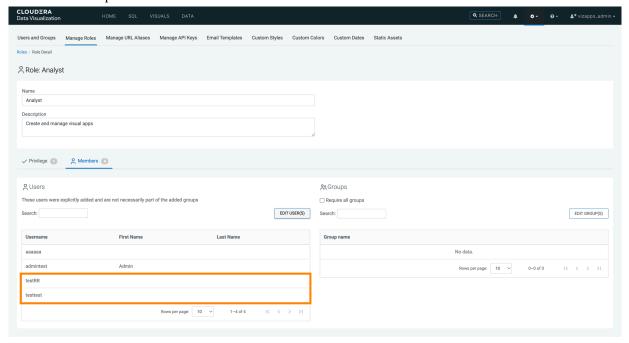
Remove

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.



Assigning roles to user groups

About this task

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

Procedure

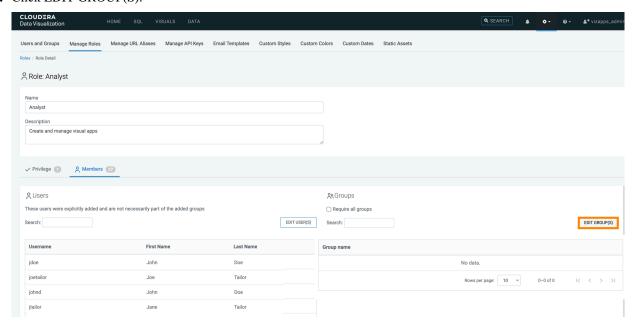
1. Navigate to the Members tab of the Role Detail interface.

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).

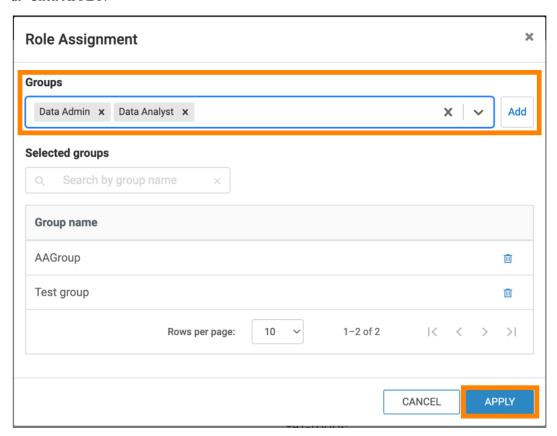


The Role Assignment modal is displayed.

3. There are several options to add groups to roles:

Search and select existing groups

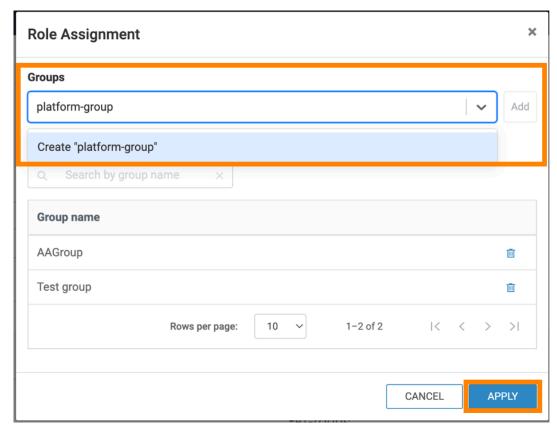
- **a.** Use the Search field to find groups by name.
- **b.** Select one or more groups from the filtered list.
- c. Click ADD to move them to the Selected groups list.
- d. Click APPLY.



Add externally defined users (LDAP authentication)

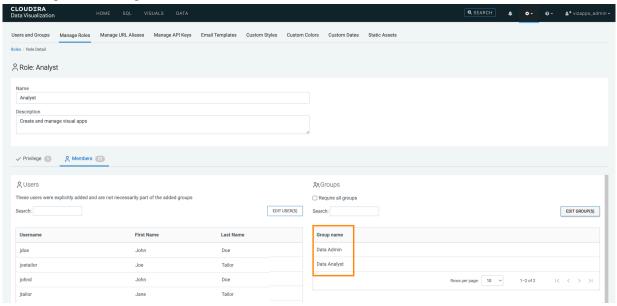
If you are using LDAP authentication, you can assign roles to groups who are not yet stored locally (for example, users who have not logged in).

- **a.** In the Groups text field, type the group name.
- **b.** Click Create to add the new group to the list.
- c. Repeat as needed.
- d. Click ADD, to move them to the Selected groups list.
- e. Click APPLY.



4. Click APPLY.

The Group name list is updated.



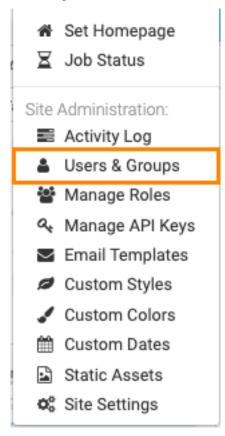
Assigning multiple roles to multiple users

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

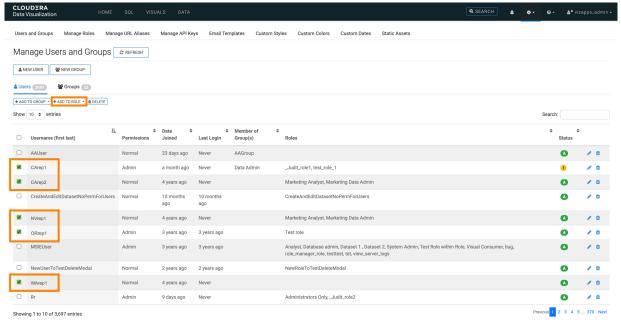
- 1. Click the Gear icon on the main navigation bar.
- 2. In the drop-down menu, select Users & Groups.



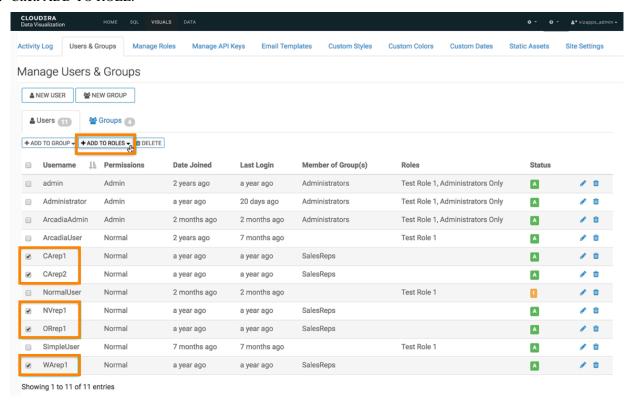
The Manage Users & Groups interface is displayed, open on the Users tab.

3. 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.

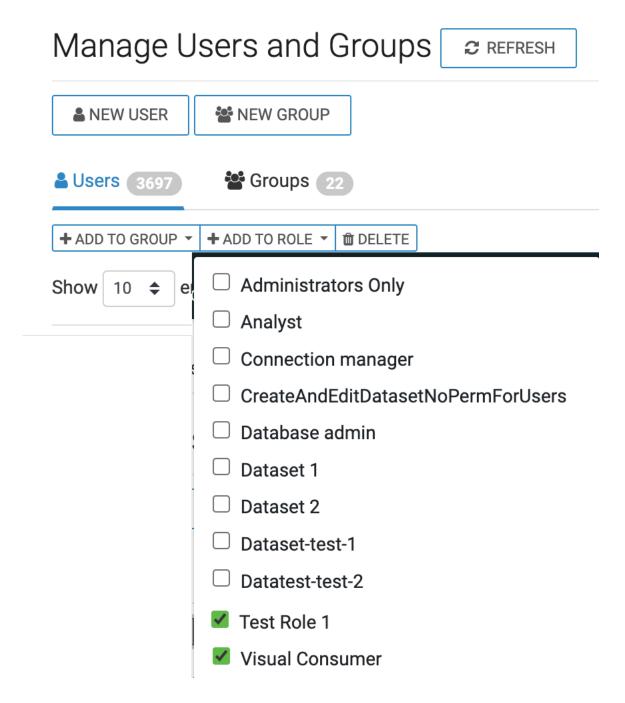


4. Click ADD TO ROLE.



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

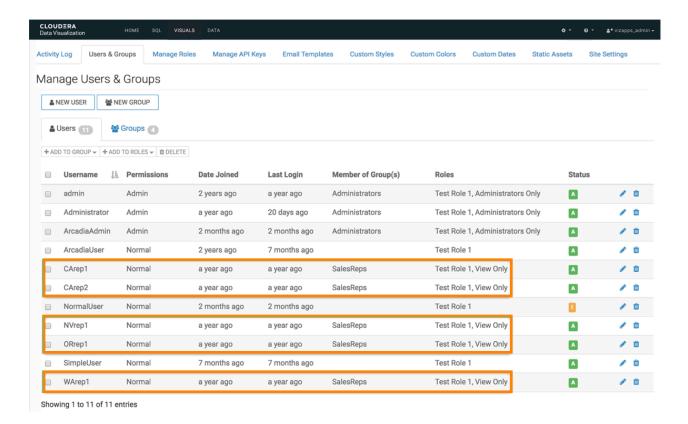
5. Check the checkboxes next to the roles you want to assign to the selected users and click Save.



Results

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

Cloudera Data Visualization Deleting roles



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



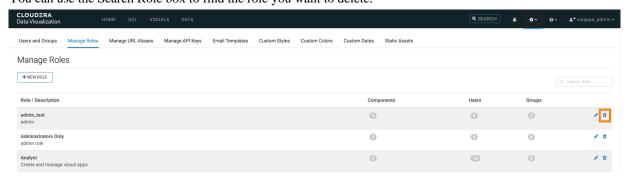
Note: This feature is only available to users with Manage roles and users privileges.

The following steps demonstrate how to add or change privileges defined for a specific role.

Cloudera Data Visualization Deleting roles

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.





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

- 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