Roles

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Role List

top This section describes how roles are created and managed within Yellowfin. Roles are allocated to users and define a set of functions that the user is permitted to access within the system. The role list is accessible via the Admin Console. As a default you will have a number of pre-configured roles. These are listed below.

Roles	М	embers
Admin		2
Corp Writer		1
Report Consumer	Default	0 🗖
Report Writer		0 🔻

Sample Yellowfin Roles

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When Yellowfin is initially deployed a standard set of roles is provided to you. These are:

Administrator The Yellowfin Administration role has access to database and user administration functions. These functions include martusers, groups and other configuration parameters. It also has all the report writing and reading access supplied by the other roles below plus advanced functions, including: SQL Reports, Public Publishing, Drill Through Reports, Discussion Admin Rights. Public Writer The Yellowfin Report Public writer has access for creating and editing Public reports. All users that are to publish reports for Public use must have the Public Role to do so. Reports created by a Yellowfin Public Writer can include drill through reports, multicast reports, and report emailing.		
		Report Consumer
Report Writer	eport Writer The Yellowfin Report Writer has access to favourites, a dashboard and Private report creation. A Yellowfin report writer cannot produce reports with drill through, broadcast or MI capabilities.	

Create Role

top

In order to create a new role you will need complete the following:

1. Click on the Add button located at the bottom of the Roles list in the Admin Console

2. You will now be taken to the Role Details page and will need to define these components:

Role Details		
Name:	Admin	
Description:	Administrator user. Has access to create and edit source systems and users.	
	Mandatory	
	Default Role	
	Guest Role	
Tour Storyboard	Welcome to Yellowfin 7 •	
	Save Cancel	

- a. Provide a meaningful Name and Description that outlines the purpose or use of the roleb. Enable the role as Mandatory, Default, or Guest as required. (Optional)

Ma nd ato ry	This means that once this role has been created, and at least one user assigned the role, when users are deleted Yellowfin will check the role to ensure there is always at least one user with this role in the system. So if you try to delete the only user assigned the Mandatory role you will experience the following error: The role Report Consumer is mandatory. You may not delete all users with this role.
Def aul t Role	This means that when a user is created in Yellowfin, either by an Administrator, or through LDAP, they will be assigned this role unless otherwise specified
Gu est Role	Guest roles are used for accessing external content.

c. Select an existing public storyboard to present to new users from the Welcome page. (Optional)

d. Enable/Disable functions as required. A description of each function is available by hovering over the info icon on the right hand side. Note: See Available Security Functions for a full list.

Functions				
▲ General				
✤ Dashboard				
 Personal Dashboard 	🗹 C 🗹 R 🗹 U 🗹 D 🌖			
Hide Dashboard Maximise Report	0			
Hide Dashboard Report Menu	0			
Public Dashboards	🗹 C 🗹 R 🗹 U 🗹 D 🚺			
Disable Add Existing Tab	0			
 Report List 				
 Report Builder 				
 Report Menu 				
 Storyboard 				
 Collaboration 				
 Configuration 				
 Administration 				
 Data Sources & Views 				
 User Administration 				
 Web Services 				

e. Define the CRUD permissions where required. Some functions will have a C R U D check list as part of the settings. The acronym CRUD refers to all of the major functions that need to be implemented. Each letter in the acronym can be mapped to a standard SQL statement:

Create	INSERT new records	
Read	SELECT records from the database	
Update	UPDATE records in the database	
Delete	DELETE records in the database	

One example of CRUD access is for dashboards. If a user only has R selected they will be able to read dashboard but not create new dashboard tabs or add reports to their tabs. Whilst a user with CRUD will be able to create and delete dashboard tabs.

f. The last option you have in the role settings is to specify what columns should be made available to users when viewing the report list.

Report List Columns
Select the columns that should be made available to users in the Report List:
Name
Description
Last Modified
Last Modified By
Туре
Run Type
Status
Run Time
Category
Sub Category
Linked
Broadcasts
Tags
🗱 Remove 🛛 🖶 Move Down 🔺 Move Up
Available Columns:
Add
Save Cancel

3. Click Save when you have completed editing to make your role available. Note: Yellowfin will do a function check to ensure you do not breach your license agreement.

Edit/Copy Role

top In order to edit the permissions assigned to a role, or make a duplicate copy of a role to manipulate use the drop down list next to the role name on the Admin Console.

Roles	Members		(j) System Information
Admin	2	-	දී _{ති} Content Translation
		Admin) S
Corp Writer	0	Edit	Jha
		Сору	-m
Report Consumer	Default 0	Delete	
Report Writer	1	•	

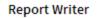
Delete Role

top

In order to delete a role use the drop down list next to the role name on the Admin Console. You will then be prompted to confirm the deletion on a separate page.

Delete Role

Please confirm that you wish to delete the selected roles. Shown below are the number of users currently attached to each role.



1 Users



Note: if there are users attached to a role you choose to delete, the users will also be removed from the system.

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