Roles

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Role List

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.

Sample Yellowfin Roles

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 managing users, 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	The Yellowfin Report Consumer can only read reports that have been published to the Public repository. Access exists to favourites, a dashboard and report viewing.
Report 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

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 role
b. Enable the role as Mandatory, Default, or Guest as required. (Optional)

Mandatory	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.
Default 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
Guest 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   ⓘ
  - ☐ Hide Dashboard Report Menu   ⓘ
  - ☑ Public Dashboards   ☑ C ☑ R ☑ U ☑ D   ⓘ
  - ☐ Disable Add Existing Tab   ⓘ
- ⌃ 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.

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

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.

Delete Role

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.

Report Writer   1 Users

Cancel   Ok

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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