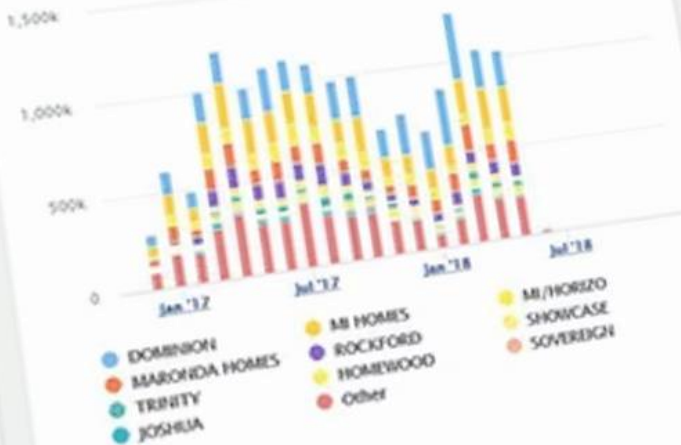


Former Reports

Revenue

Accounting Date

Total Invoice Total by Client Name



Accounting Date

Total Invoice Total by Service Type



Service Type

Count



Job Type

Count



Understanding User Security

Informer 5 Training

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Security Overview

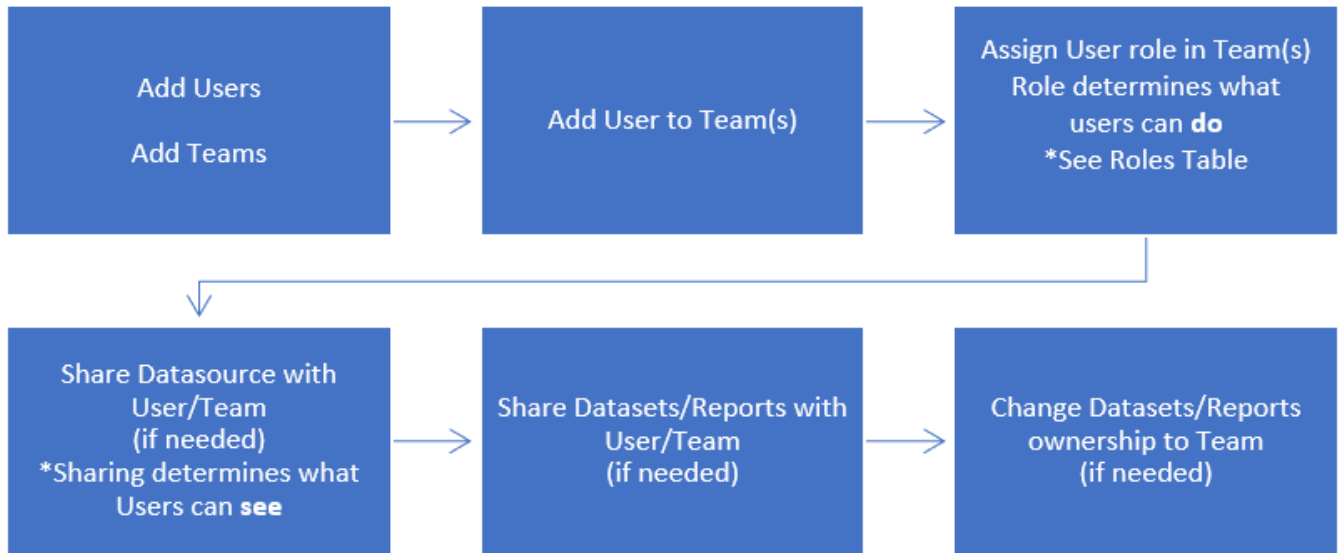
Informer 5 Security design follows to the concept of Data Governance. The Teams model ensures secure access to sensitive data, shared data is current and accurate, users interact and access the data based on determined security settings, and only those with determined access rights can alter the query behind the data.

A Team is a group of people who typically access the same data. A Team includes Users with various Roles, and Users can be members of multiple Teams. The design of Teams and Roles models the structure of an organization. A Team can only access content that it owns or content that is shared with the Team. To edit content, the Team or the User must own the content. To build dependent content, the owner of the parent content shares with the Team. For example, if the owner of a Dataset shares to a Team, then members of that Team can view the data and include the Dataset in their own Dashboards, but they cannot make changes to the Dataset. There is an exception to these rules: Super Users. Super Users ignore all permissions applied by Teams, Roles, Sharing, or Ownership. They can see, do, and create anything in Informer 5 without restriction.

Content	Permission when Shared	Permissions when Owned
Datasource	<ul style="list-style-type: none"> - Run Ad-Hoc Queries - Create Ad-Hoc Queries - Create Datasets 	<ul style="list-style-type: none"> - All Shared Permissions - Edit Datasource Connection - Delete Datasource - Share Datasource to other Teams - Add/Edit Links - Edit Mappings and Fields (hide, unhide, restrict, unrestrict, group into mapping sets, etc.)
Datasets	<ul style="list-style-type: none"> - View and Export Data - Discover Visuals - Create Pivot Table - Create Public and Private Saved Filters - Use in Reports - Use in Jobs (cannot refresh) - View Settings and Access - Add Comments 	<ul style="list-style-type: none"> - All Shared Permissions - Edit and Delete Dataset - Run/Refresh Data - Save Visuals and Pivot Tables - Use in Jobs (can refresh) - Change Settings and Access
Ad-Hoc Queries	<ul style="list-style-type: none"> - Run Query (Datasource must also be shared) - Export Data - Discover Visuals - View Access - Add Comments - Filter Data 	<ul style="list-style-type: none"> - All Shared Permissions - Edit and Delete Query - Change Access
Normal Reports	<ul style="list-style-type: none"> - View Data - Export Data - Temporarily change filter, Groups, Chart Type, or Series (Does not affect other Users' view and reverts to original on refresh) 	<ul style="list-style-type: none"> - All Shared Permissions - Edit and Delete Report

Security Setup

Below is a basic process to follow when setting up security. Set up Users, assign them to Teams and share Datasources, Datasets, and Reports as needed.



Security By Content

Datasources

Typically, the Admin or IT Team own Datasources. Certain actions on the Datasource restrict the User's Role within a team.

There are two ways to grant Users or Teams access to a Datasource; sharing or giving ownership.

For users to be able to build Datasets and Ad hoc Queries, or to be able to run Ad hoc Queries, Users or Teams need to have access to the Datasource. **Best practice is to grant access to Datasources by sharing it, which grants them read-only access.**

Ownership

The owner of a Datasource has full access and can update Mappings, Fields, Links, Mapping Sets and Mapping Suites. The Owner can also update the access to the Datasource. Best practice is to have the

System Administrator User own Datasources, unless Users create specific Datasources or Workspaces specific to a Team.

Change Owner

"Change Owner" allows for granting Ownership of a Datasource to Teams in which the User is an Admin. The User granting the Ownership, must be the Owner or have Admin access to the Datasource. Super Users are the exception - they can share to any User and/or Team.

From a Datasource, click the "Access" icon on the left panel (Figure 1).

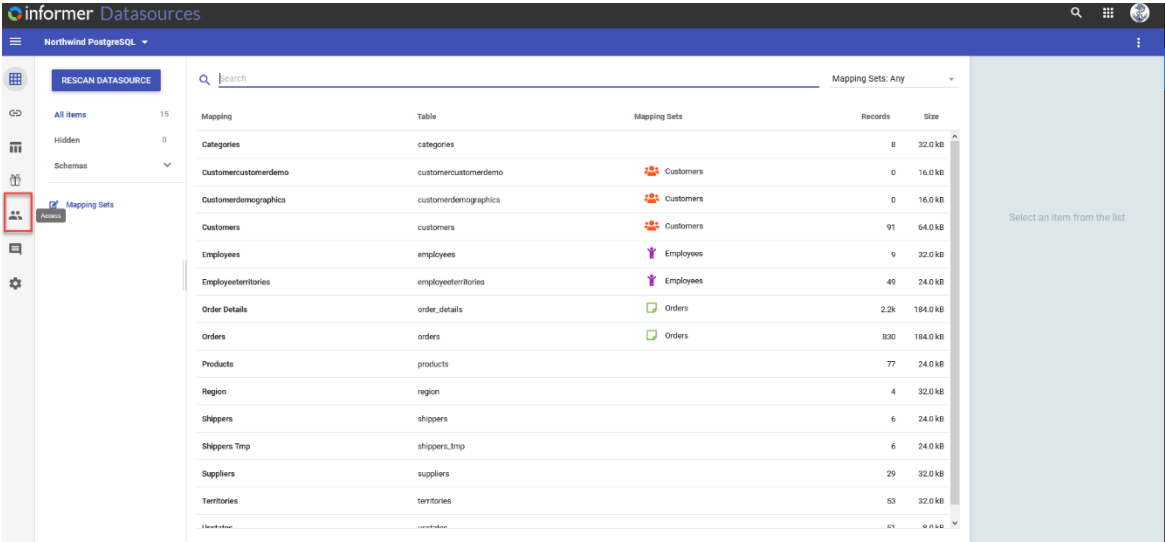


Figure 1: Datasource Access

Click on "Owner" and choose from list of available Teams where the Owner is an Admin and click "Save" (Figure 2).

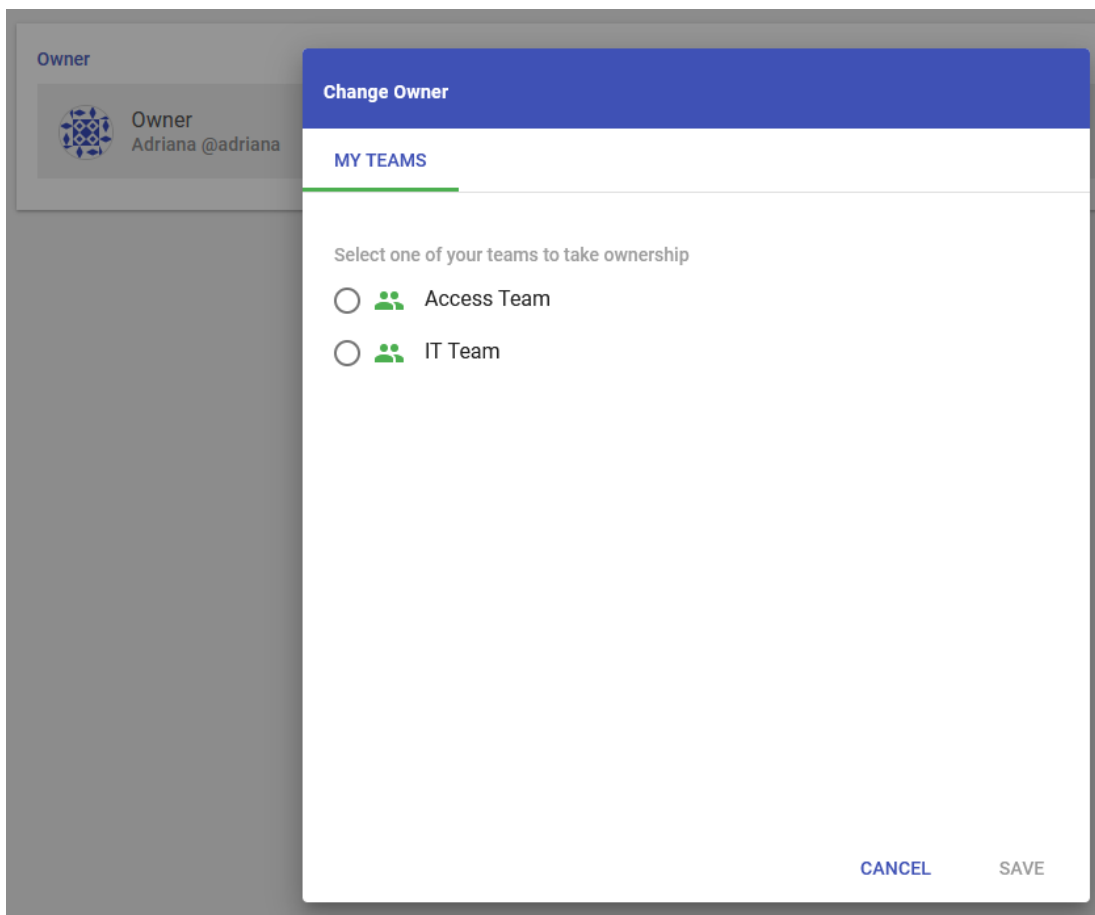


Figure 2: Granting Ownership to a Team

Sharing

Sharing a Datasource with a User or Team will grant read-only access to the Datasource. This grants Users and Teams enough access to be able build Datasets and Ad hoc Queries, and to be able to run Ad hoc Queries.

From a Datasource, click the "Access" icon in the left panel (Figure 3). To share a Datasource, a Team must own the Datasource and User sharing the Datasource must be an Admin in the owning team.

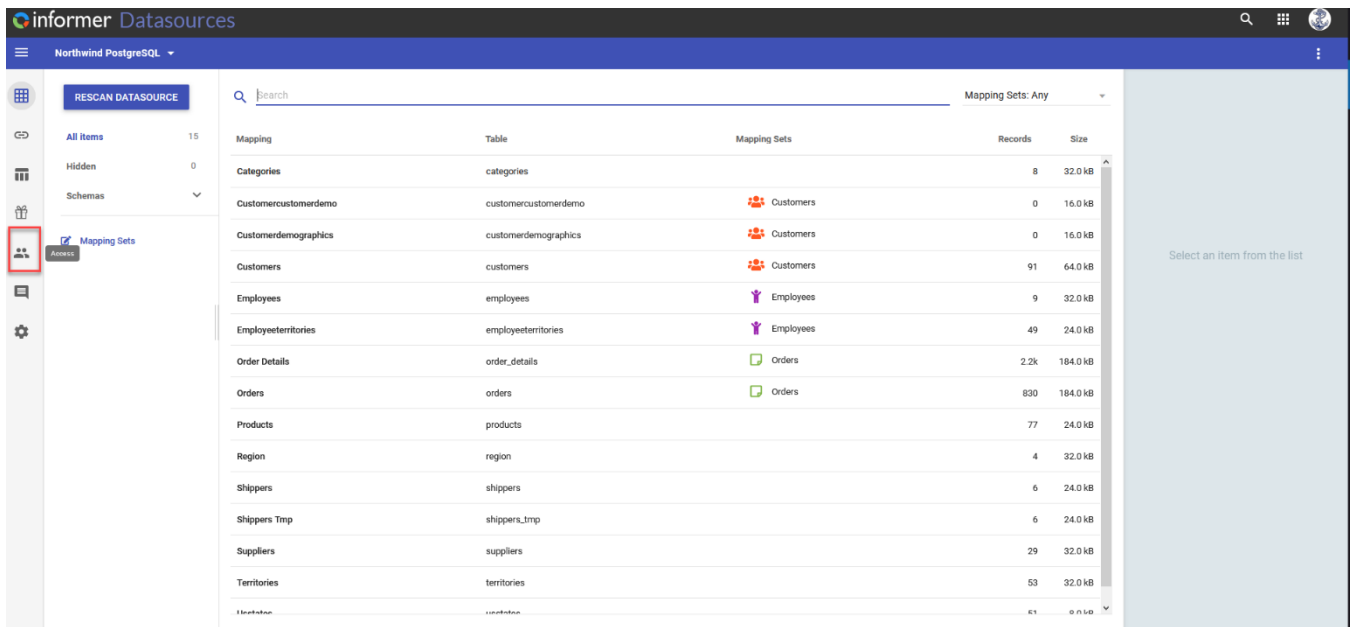


Figure 3: Datasource Access

Click the toggle "Share Datasource" to enable sharing and click the "Add User or Team" button (Figure 4).

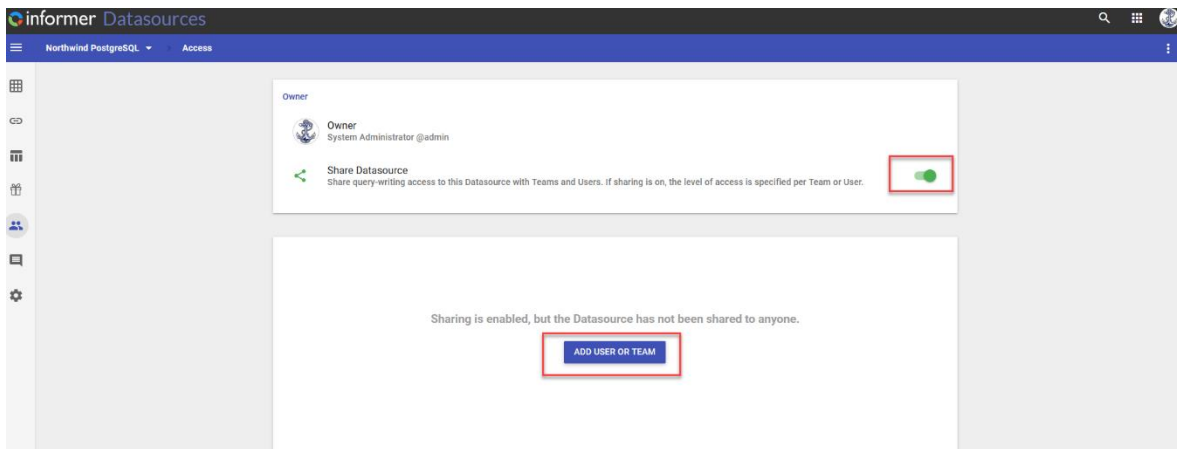


Figure 4: Share Datasource

Manage Users/Teams

Select the Users and Teams to grant access to the Datasource and choose the access level.

Users and Teams

Begin typing the name of the User(s) and or Team(s) requiring access (Figure 5).

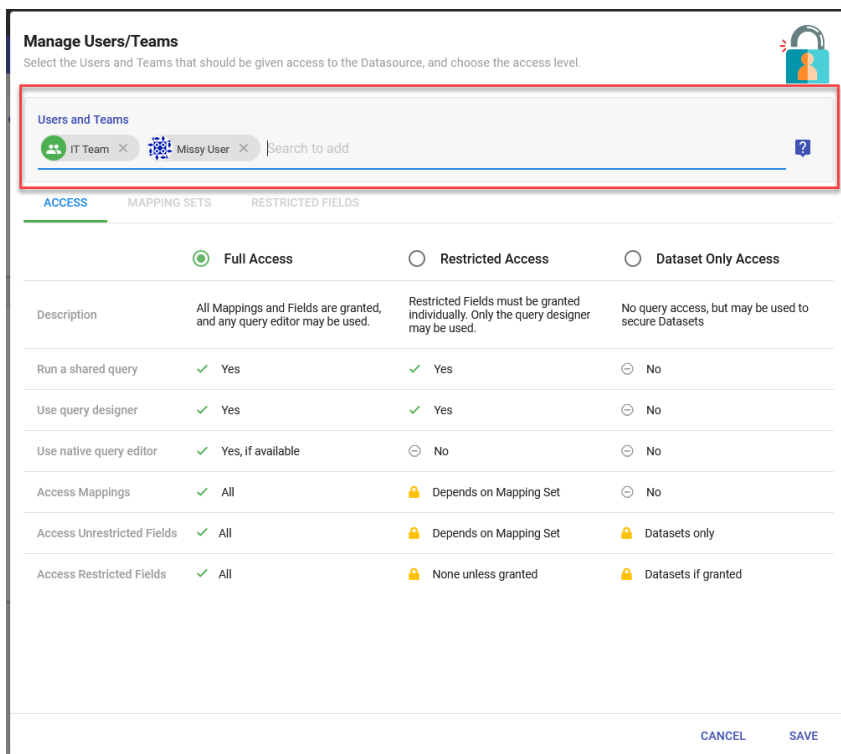


Figure 5: Granting Access to a User and/or Team.

Access

Choose the level of access to the Datasource for the selected Users and Teams (Figure 6).

- **Full Access** grants Users and Teams access to all Mappings and Fields and any query editor (Query Designer or Native SQL Query) is available
- **Restricted Access** all Mappings are available, restricted fields must be explicitly granted and only the Query Designer is available
- **Dataset Only Access** does not grant Query access and allows to secure Datasets and restricted fields must be explicitly granted.

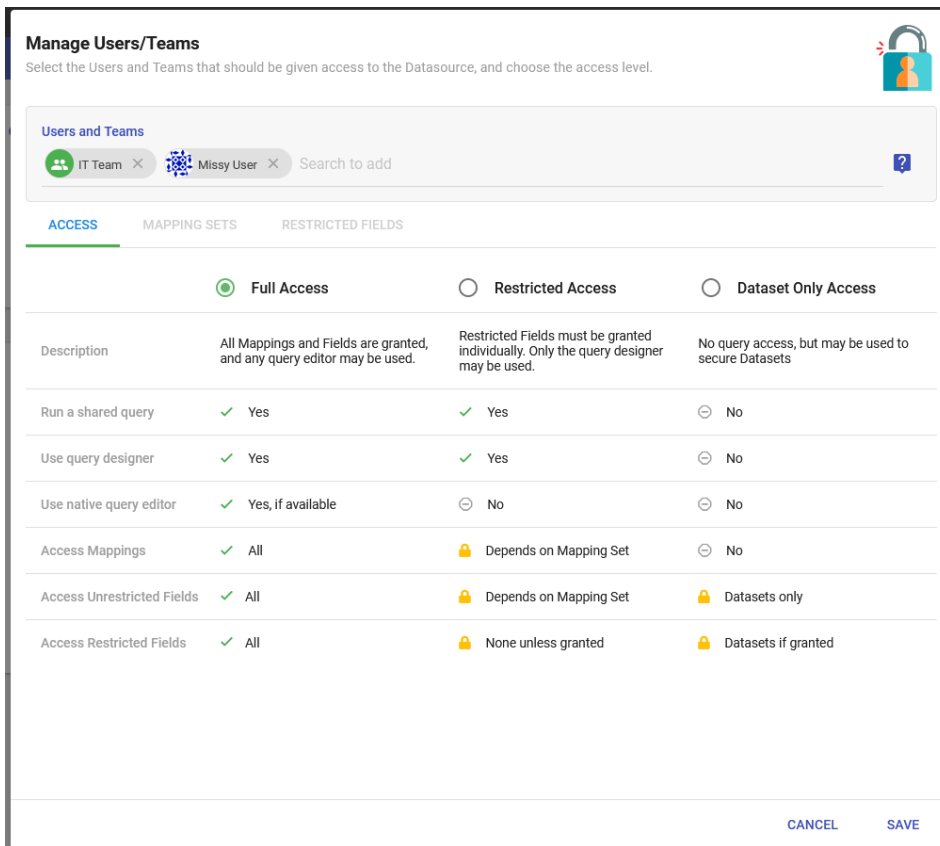


Figure 6: Access Level

Mapping Sets

With restricted access, all Mappings are available and restricted fields must be explicitly granted. Click on "Customize access by Mapping Set" to grant access based on Mapping Sets. Mappings that are not in a Mapping Set are not shared and Mappings that are in more than one Mapping Set will get the highest level of access given from any of the Mapping Sets.

See [Mapping Sets & Restricted Fields](#) for more information on how to setup Mapping Sets.

Options to grant Mapping Set Access (Figure 7):

- **Full** - Restricted Fields are automatically granted for all Mappings in the Mapping Set
- **Restricted** - No Restricted Fields appear for all Mappings in the Mapping Set, unless explicitly granted.
- **None** - Mappings in the Mapping Set will not appear. This is the default.

Figure 7: Mapping Sets

Restricted Fields

Explicitly grant access to Restricted Fields to a User or Team. Search for the Field or Field Set and click on "Add" to grant the User or Team access to that Field (Figure 8).

The screenshot shows the 'Manage Users/Teams' interface. At the top, there is a title 'Manage Users/Teams' and a subtitle 'Select the Users and Teams that should be given access to the Datasource, and choose the access level.' Below this is a search bar with 'Access Team' and a 'Search to add' input. The 'RESTRICTED FIELDS' tab is selected and highlighted with a red box. Below the search bar is a table with columns: Field, Mapping, Alias, Field Set, Data Type, and Access. The 'Access' column for the 'Birth Date' field is highlighted with a red box and contains the text 'ADDED'. The 'Employee' field has an 'ADD' button. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Field	Mapping	Alias	Field Set	Data Type	Access
Birth Date	Employees	BirthDate		Date	ADDED
Employee	Orders	EmployeeID		Integer number	ADD

Figure 8: Restricted Fields

A list of Users/Teams and their respective access displays for each Datasource, including Team/Username, Access Level and Restricted Fields (Figure 9).

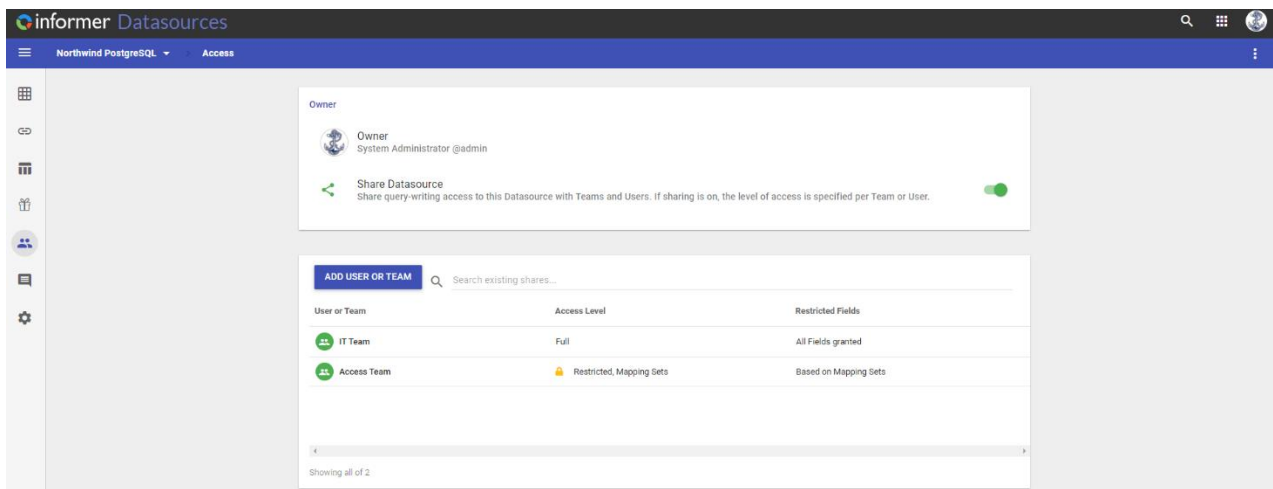


Figure 9: Datasource Access

Datasets

Restrict specific actions on the Dataset by a User's Role within a team. Those Roles are covered later.

Datasets		
	<ul style="list-style-type: none">- View and Export Data- Discover Visuals- Create Pivot Table- Create Public and Private Saved Filters- Use in Reports- Use in Jobs (cannot refresh)- View Settings and Access- Add Comments	<ul style="list-style-type: none">- All Shared Permissions- Edit and Delete Dataset- Run/Refresh Data- Save Visuals and Pivot Tables- Use in Jobs (can refresh)- Change Settings and Access

Ownership

The default Owner of a Dataset is the creator. This User has full access and can change the Owner to another User or Team. To have Edit access to Datasets, Users must belong to a Team that owns the Dataset and have a role of Data Wizard or greater. Super Users are the exception - they can share to any User and/or Team.

NOTE: When changing ownership to a Team the creator is not a member of, they will no longer have access to the Dataset.

Change Owner

"Change Owner" allows for granting Ownership of a Dataset to Teams in which the User is a Data Wizard or greater. The User granting the Ownership, must be the Owner or have Publisher access to the Dataset.

From a Dataset, click the "Access" icon in the left panel (*Figure 1*).

The screenshot shows the Informer Datasets interface for 'Northwind Orders'. The table displays columns for CUSTOMER, Order Date, Country, Employee, Freight, Order, Required Date, Ship Address, Ship City Changed for Test, Ship Name, Ship Region, and Ship Postal Code. The 'Access' icon in the left panel is highlighted with a red box.

CUSTOMER	Order Date	Country	Employee	Freight	Order	Required Date	Ship Address	Ship City Changed for Test	Ship Name	Ship Region	Ship Postal Code
ALFKI	8/25/1997	Germany	6	\$29.46	10,643	9/22/1997	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	10/3/1997	Germany	4	\$61.02	10,692	10/31/1997	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	10/13/1997	Germany	4	\$23.94	10,702	11/24/1997	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	1/15/1998	Germany	1	\$60.53	10,835	2/12/1998	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	3/16/1998	Germany	1	\$40.42	10,952	4/27/1998	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	4/9/1998	Germany	3	\$1.21	11,011	5/7/1998	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ANATR	9/8/1996	Mexico	7	\$1.61	10,308	10/16/1996	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	8/8/1997	Mexico	3	\$48.90	10,625	9/5/1997	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	11/28/1997	Mexico	3	\$11.99	10,759	12/26/1997	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	3/4/1998	Mexico	4	\$39.92	10,926	4/1/1998	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANTON	11/27/1996	Mexico	3	\$22.00	10,365	12/25/1996	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	4/15/1997	Mexico	7	\$47.45	10,507	5/13/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	5/13/1997	Mexico	4	\$15.64	10,535	6/10/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	6/19/1997	Mexico	7	\$84.84	10,573	7/17/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	9/22/1997	Mexico	1	\$4.03	10,677	10/20/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	9/25/1997	Mexico	3	\$36.13	10,682	10/23/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	1/28/1998	Mexico	3	\$38.43	10,856	2/25/1998	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
AROUT	11/15/1996	UK	6	\$41.95	10,355	12/13/1996	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	12/16/1996	UK	8	\$34.24	10,383	1/13/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	2/21/1997	UK	1	\$25.36	10,453	3/21/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	6/4/1997	UK	1	\$72.97	10,558	7/2/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX

Figure 1: Dataset Access

Click on "Owner" and choose from list of available Teams where the Owner is a Data Wizard or greater and click "Save" (Figure 2).

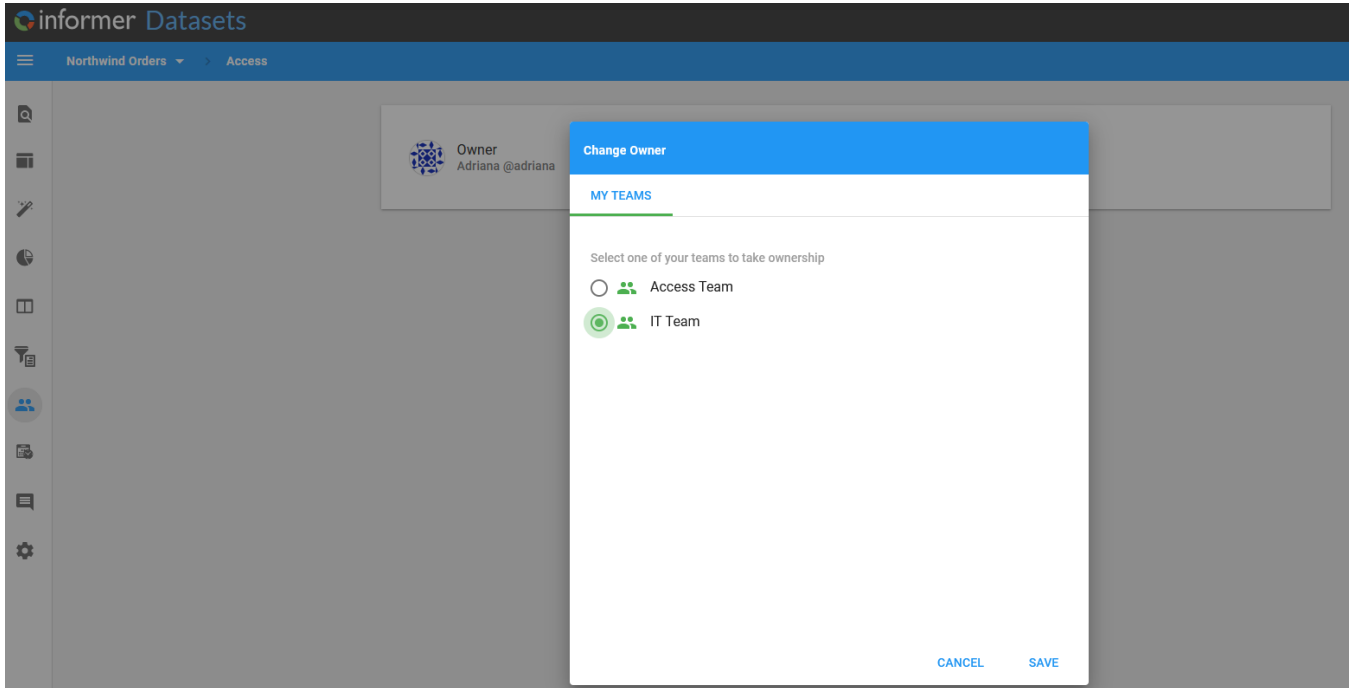


Figure 2: Granting Ownership to a Team

Sharing

Sharing a Dataset with a Team will grant read-only access to the data and Visuals, allowing for the creation of Filters, Jobs, and Reports (Dashboards, Comparison Boards and Data Views).

The owner must change the Dataset ownership to a Team before sharing the Dataset outside the owning Team. The User must have a role of Publisher or higher in the owning Team to share to other Teams. Super Users are the exception - they can share to any User and/or Team.

From a Dataset, click the "Access" icon in the left panel (Figure 3).

informer Datasets

Northwind Orders

Filter

Add Group

CUSTOMER	Order Date	Country	Employee	Freight	Order	Required Date	Ship Address	Ship City Changed for Test	Ship Name	Ship Region	Ship Postal Cod
ALFKI	8/25/1997	Germany	6	\$29.46	10,643	9/22/1997	Obere Str. 57	Berlin	Alfreds Futterkiste		12209
ALFKI	10/3/1997	Germany	4	\$61.02	10,692	10/31/1997	Obere Str. 57	Berlin	Alfred's Futterkiste		12209
ALFKI	10/13/1997	Germany	4	\$23.94	10,702	11/24/1997	Obere Str. 57	Berlin	Alfred's Futterkiste		12209
ALFKI	1/15/1998	Germany	1	\$69.53	10,835	2/12/1998	Obere Str. 57	Berlin	Alfred's Futterkiste		12209
ALFKI	3/16/1998	Germany	1	\$40.42	10,952	4/27/1998	Obere Str. 57	Berlin	Alfred's Futterkiste		12209
ALFKI	4/9/1998	Germany	3	\$1.21	11,011	5/7/1998	Obere Str. 57	Berlin	Alfred's Futterkiste		12209
ANATR	9/18/1996	Mexico	7	\$1.61	10,308	10/16/1996	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	8/8/1997	Mexico	3	\$43.90	10,625	9/5/1997	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	11/28/1997	Mexico	3	\$11.99	10,759	12/26/1997	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANATR	3/4/1998	Mexico	4	\$39.92	10,926	4/1/1998	Avda. de la Constitución 2222	México D.F.	Ana Trujillo Emparedados y helados		05021
ANTON	11/27/1996	Mexico	3	\$22.00	10,365	12/25/1996	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	4/15/1997	Mexico	7	\$47.45	10,507	5/13/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	5/13/1997	Mexico	4	\$15.64	10,535	6/10/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	6/19/1997	Mexico	7	\$84.84	10,573	7/17/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	9/22/1997	Mexico	1	\$4.03	10,677	10/20/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	9/25/1997	Mexico	3	\$36.13	10,682	10/23/1997	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
ANTON	1/28/1998	Mexico	3	\$58.43	10,856	2/25/1998	Mataderos 2312	México D.F.	Antonio Moreno Taquería		05023
AROUT	11/15/1996	UK	6	\$41.95	10,355	12/13/1996	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	12/16/1996	UK	8	\$34.24	10,383	1/13/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	2/21/1997	UK	1	\$25.36	10,453	3/21/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
AROUT	6/4/1997	UK	1	\$72.97	10,558	7/2/1997	Brook Farm Stratford St. Mary	Colchester	Around the Horn	Essex	CO7 6JX
				\$64,942.69	8,849,875						

As of: May 4, 2021 at 10:02 AM Records: 830

Showing all rows

Figure 3: Dataset Access

Click the toggle "Share Dataset" to enable sharing and click the "Add User or Team" button (Figure 4).

informer Datasets

Northwind Orders

Access

EDIT REFRESH

Owner
IT Team

Share Dataset
Allow other Teams and Users read-only access to this Dataset. If sharing is on, specific Teams and Users must be specified.

Sharing is enabled, but the Dataset has not been shared to anyone.

ADD USER OR TEAM

Figure 4: Share Dataset

Add User/Team

Select the Users and Teams that need access to the Dataset and access level for reading the content of the Dataset.

User and Teams

Begin typing the name of the User(s) and or Team(s) requiring access (*Figure 5*).

Add User/Team

Select the Users and Teams that should be given access to the Dataset, and choose the access level for reading the content of the Dataset.

Users and Teams

Access Team × Missy User × Search for Users and Teams

Any existing sharing for the specified Users and Teams will be overwritten by the settings selected below.

Row level security

No filter

Field level security

Allow all fields

Use Datasource security to determine field access

CANCEL SAVE

Figure 5: Granting Access to a User and/or Team.

Row level security

Use existing Saved Filters to limit User or Team access to Query results (*Figure 6*). By choosing a Saved Filter, the shared Dataset will appear to only have the records after the Filter has been applied. Note that this Filter will apply to any report (Dashboard, Comparison Board, Data View) built off the Dataset.

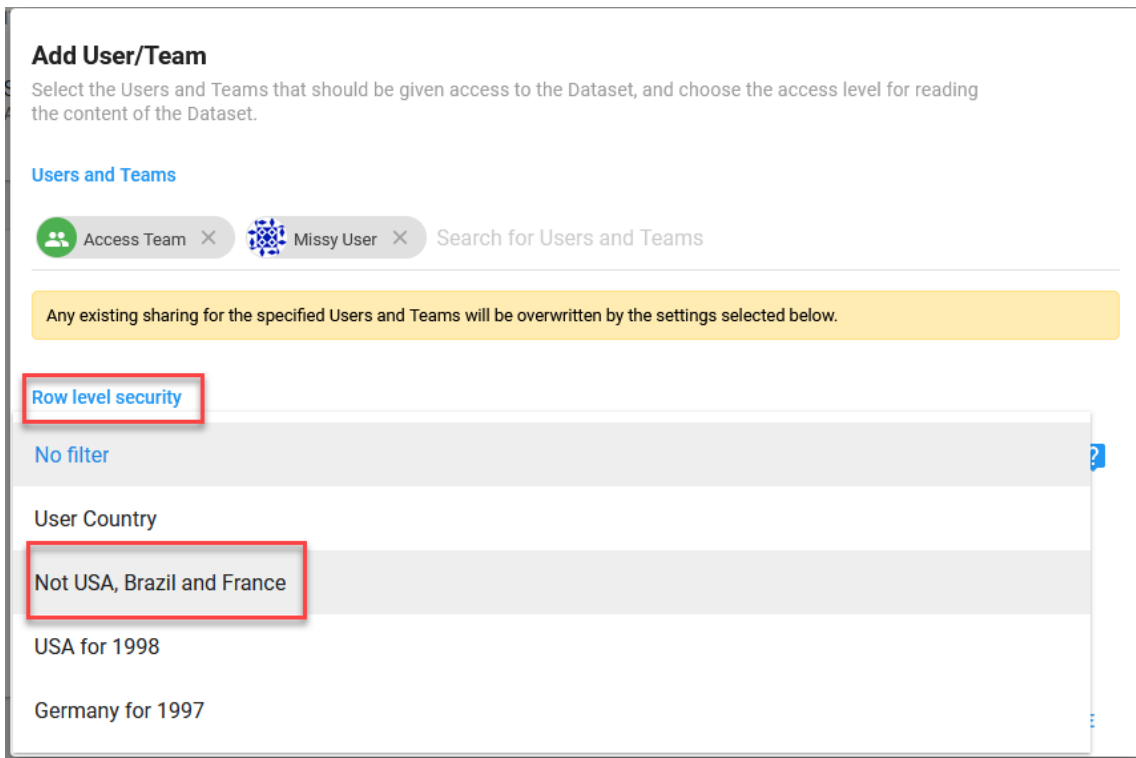


Figure 6: Use saved filter to apply row level security

Field level security

Chose to allow Users and Teams to access all fields or use Datasource security to determine field access (Figure 7).

Add User/Team

Select the Users and Teams that should be given access to the Dataset, and choose the access level for reading the content of the Dataset.

Users and Teams

Access Team × Missy User × Search for Users and Teams

Any existing sharing for the specified Users and Teams will be overwritten by the settings selected below.

Row level security

Not USA, Brazil and France

Field level security

Allow all fields
 Use Datasource security to determine field access

NOTE: Security only applies to those fields which have a Datasource field associated with them.

The link between Dataset and Datasource fields happens when the Dataset is refreshed. Some fields, e.g. flow step fields, will need to be assigned to a Datasource field manually in the Dataset's field page.

There is also an action available in the Dataset menu to link fields without having to refresh a Dataset. It is available as a bulk action from the Dataset list page as well.

CANCEL SAVE

Figure 7: Apply field level security

Removing Access

To remove shared access to User(s) or Team(s) from a Dataset, choose "Access" within the Dataset, click on the User or Team to remove, and click "Revoke" (Figure 8).

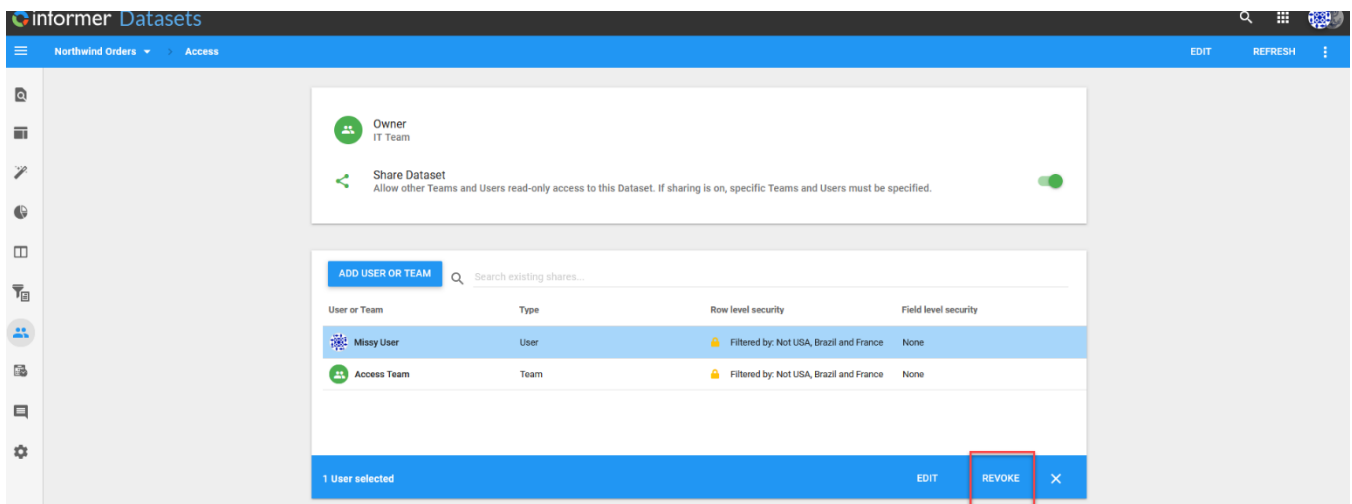


Figure 8: Revoke Access

Ad-Hoc Query vs. Dataset Query

There are two types of Queries in the system - Dataset Queries and Ad hoc Queries. Datasets are the preferred method for working with data and are the more flexible way to manage and share out larger result sets. The concept of a Dataset Query promotes data governance by creating a single source of truth. Having one Dataset be the source of multiple Reports lends to the consistency of data across an institution or organization. However, there are times when it is necessary to use Ad hoc Queries to give fast, temporary results based on run-time parameters (*Figure 1*). For example, the data needs to be live at run-time when processing a payroll run for specific dates and making sure everything is in balance.

While refreshing a Dataset Query is analogous with running an Ad hoc Query, that might not always be an option if other content is dependent on that Dataset and end users are expecting the Dataset to refresh at specific times.

Ad hoc Queries have a similar structure to Datasets Queries:

- Ad hoc Queries run against a Datasource.
- Ad hoc Queries have Field and Criteria definitions.
- Ad hoc Queries can have Flow Steps defined.

They differ from Datasets in that:

- Ad hoc Queries can be converted into a Dataset Query.
- Ad hoc Queries result sets have a short lifespan.
- Ad hoc Queries result sets are only available to the User who ran the Query.
- Ad hoc Queries result sets cannot have any Visuals saved from them.
- Ad hoc Queries are a type of Report, while Datasets are their own category of content.

Creating and editing Queries, whether it is a Dataset Query or an Ad hoc Query, use the same process. The Query Designer gives a way to easily add Fields, Criteria, Flow Steps, and any other customization that Query authors might need when preparing data for end-users. Additionally, there is an option to write a Query using Native SQL if it written against a SQL Datasource.

Both Query types are shareable with other Users and Teams in the system. Sharing a Dataset will grant Users or Teams read-only access to the Dataset Query's result set, but not the ability to refresh the Dataset Query. Since an Ad hoc Query's result set is user-specific, sharing an Ad-hoc Query grants Users or Teams the ability to run the Ad hoc Query. For more information on access permissions, please see the [Security Setup](#) article.

informer Reports

Northwind Orders > Results

EDIT RUN

+ Filter

Add Group Columns Aggregates Options

Customer	Employee	Freight	Order	Order Date	Required Date	Ship Address	Ship City	Ship Country
VICTE	8	8.56	10,334	10/21/1996	11/18/1996	2, rue du Commerce	Lyon	France
HUNGO	7	42.11	10,335	10/22/1996	11/19/1996	8 Johnstown Road	Cork	Ireland
PRINI	7	15.51	10,336	10/23/1996	11/20/1996	Estrada da saúde n. 58	Lisboa	Portugal
FRANK	4	108.26	10,337	10/24/1996	11/21/1996	Berliner Platz 43	München	Germany
OLDWO	4	84.21	10,338	10/25/1996	11/22/1996	2743 Bering St.	Anchorage	USA
MEREP	2	15.66	10,339	10/28/1996	11/25/1996	43 rue St. Laurent	Montréal	Canada
BONAP	1	166.31	10,340	10/29/1996	11/26/1996	12, rue des Bouchers	Marseille	France
SIMOB	7	26.78	10,341	10/29/1996	11/26/1996	Vinbæltet 34	Kobenhavn	Denmark
FRANK	4	54.83	10,342	10/30/1996	11/13/1996	Berliner Platz 43	München	Germany
LEHMS	4	110.37	10,343	10/31/1996	11/28/1996	Magazinweg 7	Frankfurt a.M.	Germany
WHITC	4	23.29	10,344	11/1/1996	11/29/1996	1029 - 12th Ave. S.	Seattle	USA
QUICK	2	249.06	10,345	11/4/1996	12/2/1996	Taucherstraße 10	Cunewalde	Germany
RATTC	3	142.08	10,346	11/5/1996	12/17/1996	2817 Milton Dr.	Albuquerque	USA
FAMIA	4	3.10	10,347	11/6/1996	12/4/1996	Rua Orós, 92	Sao Paulo	Brazil
WANDK	4	0.78	10,348	11/7/1996	12/5/1996	Adenauerallee 900	Stuttgart	Germany
SPLIR	7	8.63	10,349	11/8/1996	12/6/1996	P.O. Box 555	Lander	USA
LAMAI	6	64.19	10,350	11/11/1996	12/9/1996	1 rue Alsace-Lorraine	Toulouse	France
ERNSH	1	162.33	10,351	11/11/1996	12/9/1996	Kirchgasse 6	Graz	Austria

As of: Apr 26, 2021 at 11:01 AM Records: 830

Showing all rows

Figure 1: Ad-hoc Query Results

Report Ownership and Access

There are two ways to grant Users or Teams access to a Report - either by sharing or giving ownership.

Ownership

The default Owner of a Report is the creator. This User has full access and can change the Owner to another Team they belong to.

In order to have Edit access to Reports, Users must belong to a Team that owns the Report and have a role of Data Designer or greater. Super Users are the exception - they can share to any User and/or Team.

Change Owner

"Change Owner" allows for granting Ownership of a Report to Teams in which the User is a Data Wizard or greater. From a Report, click the "Access" icon in the left panel (*Figure 1*).

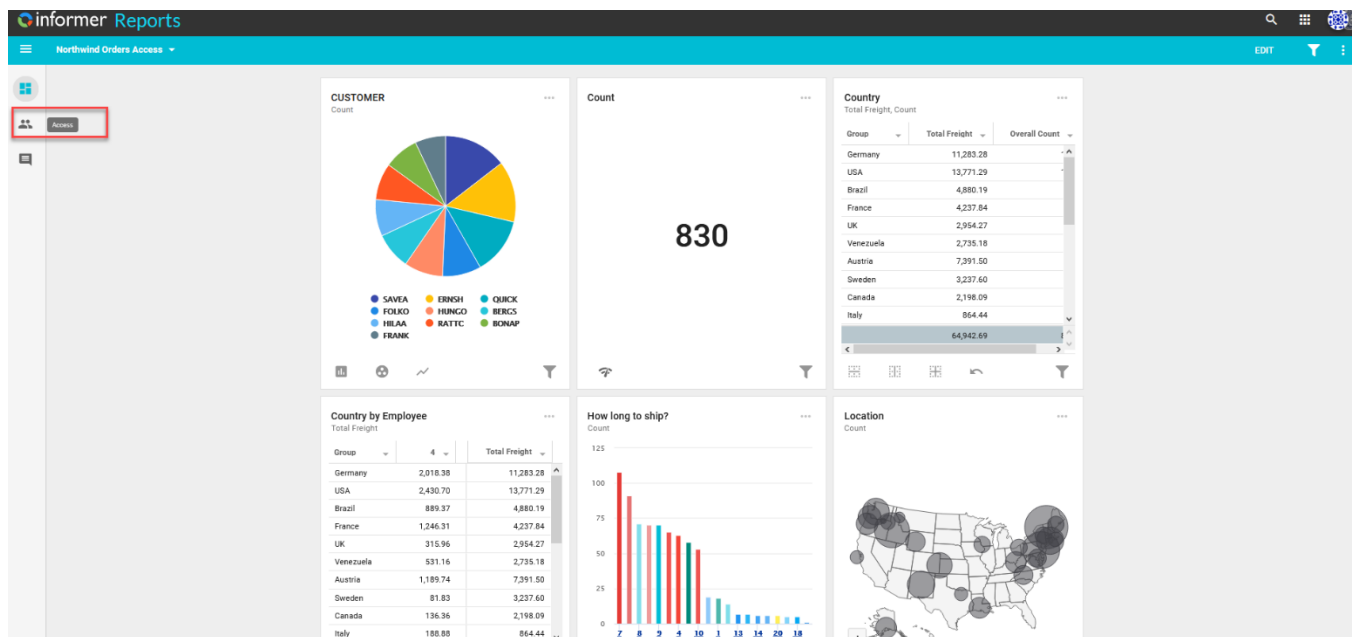


Figure 1: Report Access

Click on "Owner" and choose from list of available Teams (*Figure 2*).

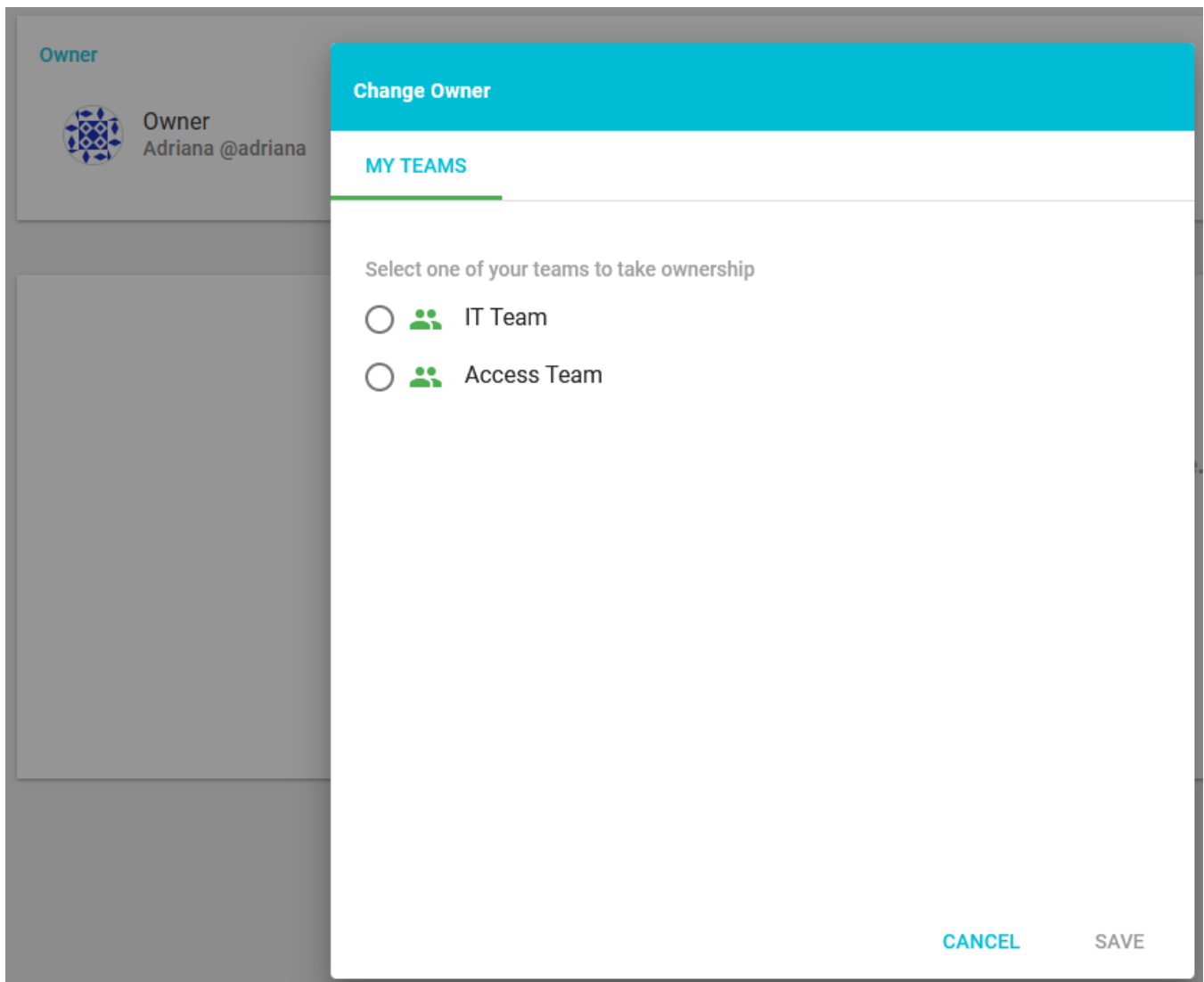


Figure 2: Granting Ownership to a Team

Sharing

Sharing a Report with a Team will grant read-only access to the data and Visuals, allowing for the creation of Filters and Jobs. The Report owner is the only one able to modify the Report or share its' data with other Users or Teams.

For Reports (Dashboards, Comparison Boards and Data Views) the creator must change the Report ownership to a Team before sharing the Report outside the owning Team. The role the User has on the owning Team will determine if the User has access rights to share to other Teams. Super Users are the exception - they can share to any User and/or Team.

For Ad hoc Queries, the creator can share to any User or Team. Note that the shared-to User/Team must have access rights to the Datasource backing the Ad hoc Query to run the Query. If the ownership of the Ad hoc changes to a Team, the role the User has on the owning Team will determine if the User has access rights to share to other Teams. Super Users are the exception - they can share to any User and/or Team. These workflows follow Data Governance best practices.

Share Report (Dashboard, Comparison Board, Data View)

"Share" allows for granting read-only access to a Report to a User or Team. From a Report, click the "Access" icon in the left panel (Figure 3). To share a Report, a Team must own the Report and User sharing the report must be a Publisher in the owning team.

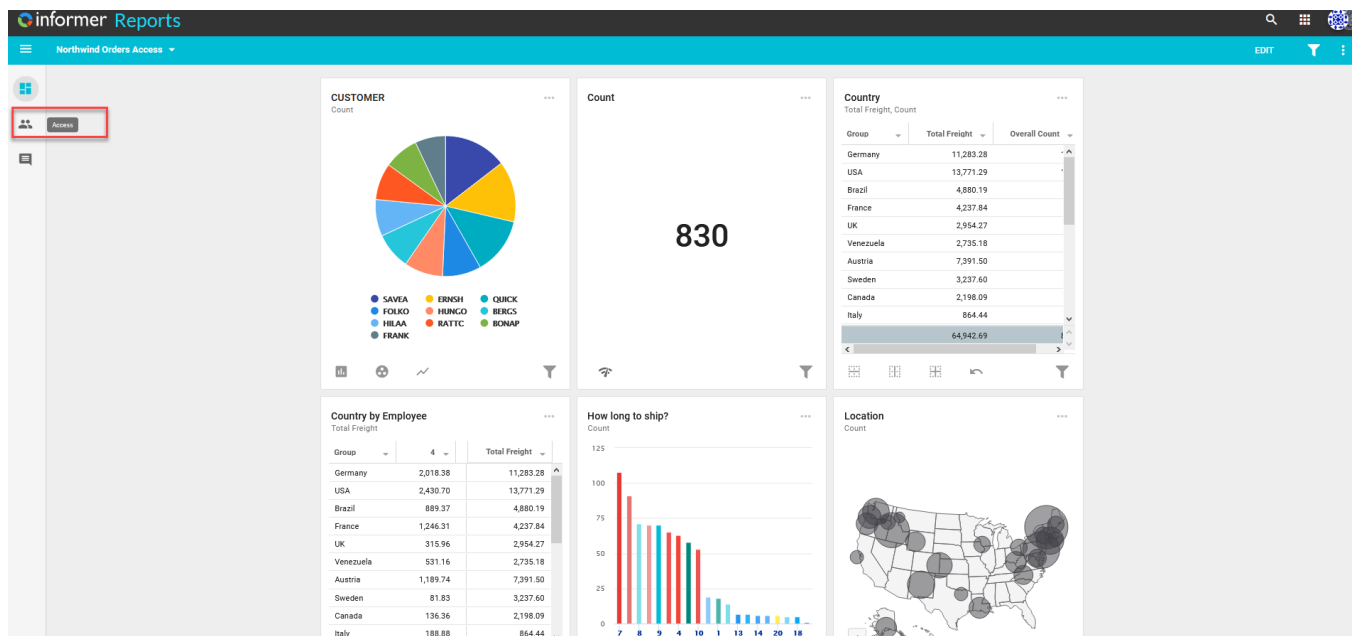


Figure 3: Report Access

Click the toggle "Share Report" to enable sharing and click the "Add User or Team" button (Figure 4).

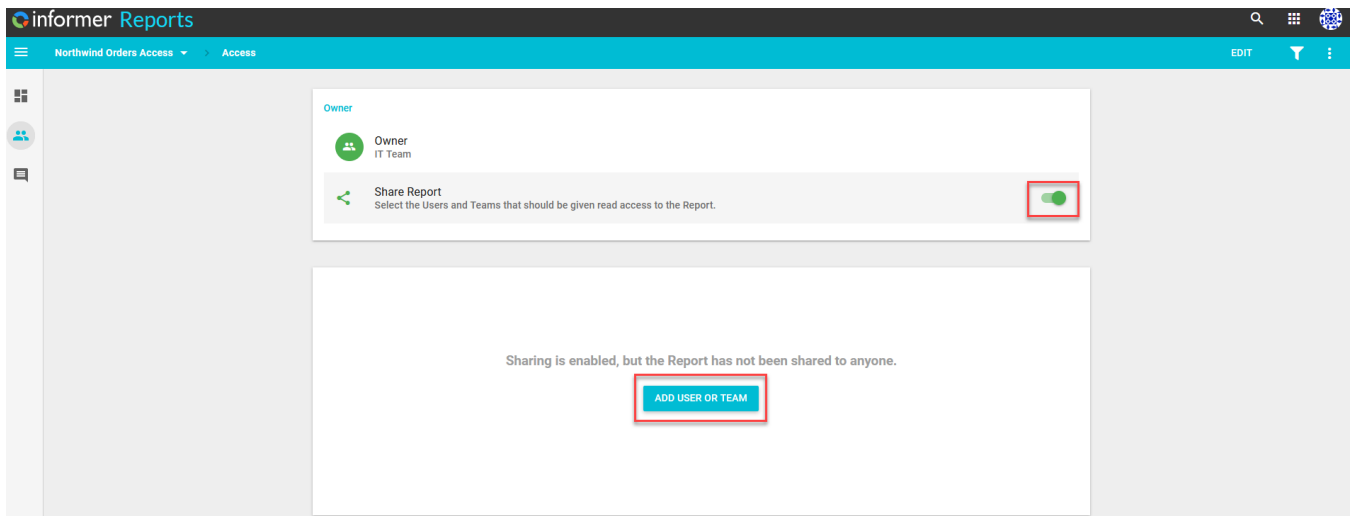


Figure 4: Share Report

Begin typing the name of the User(s) or Team(s) requiring access (Figure 5). Finish selecting all User(s) and/or Team(s) then click "Save".

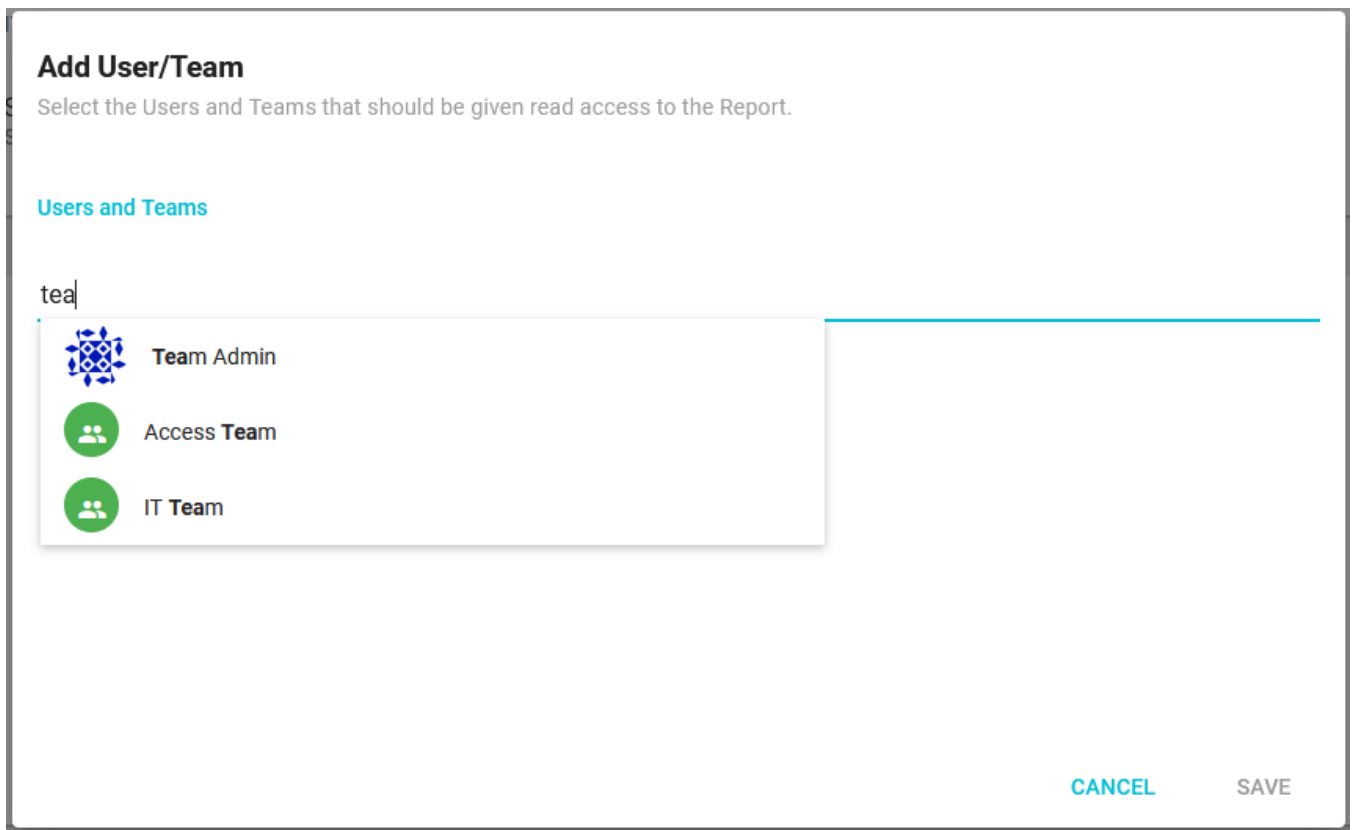


Figure 5: Add User/Team to Report

Share Ad hoc Query

"Share" allows for granting read-only access to a Report to a User or Team. From a Report, click the "Access" icon in the left panel (Figure 6). The report creator can share the Ad hoc Query with any User or Team. If the Team owns the Ad hoc Query, the User sharing the report must be a Publisher in the owning Team.

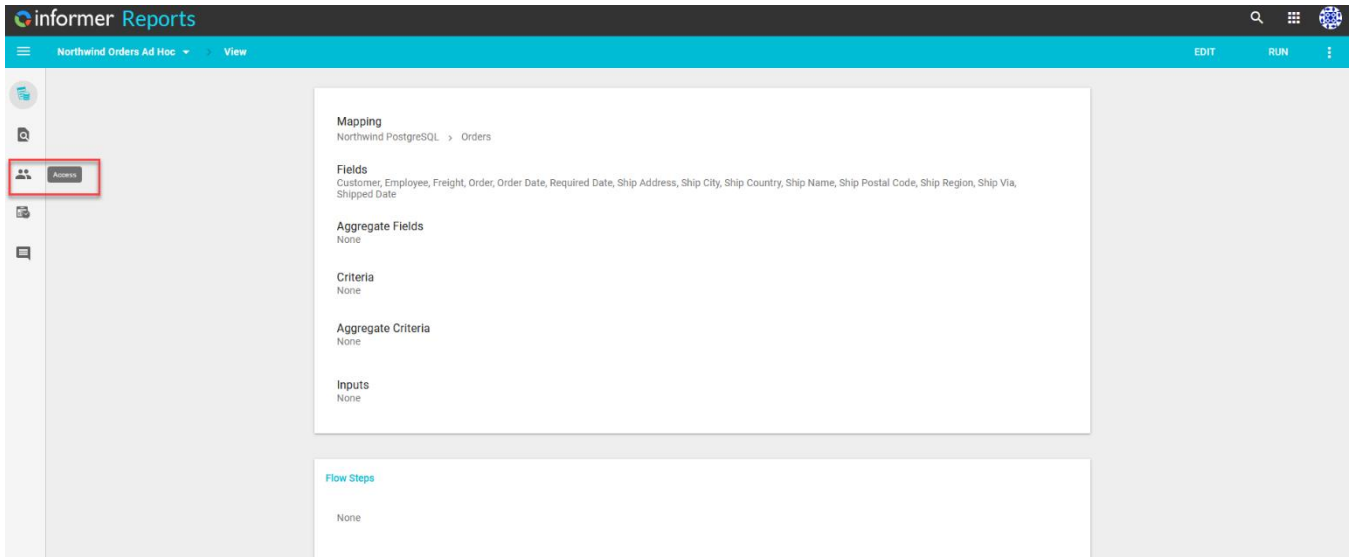


Figure 6: Ad hoc Query Access

Click the toggle "Share Query" to enable sharing and click the "Add User or Team" button (Figure 7).

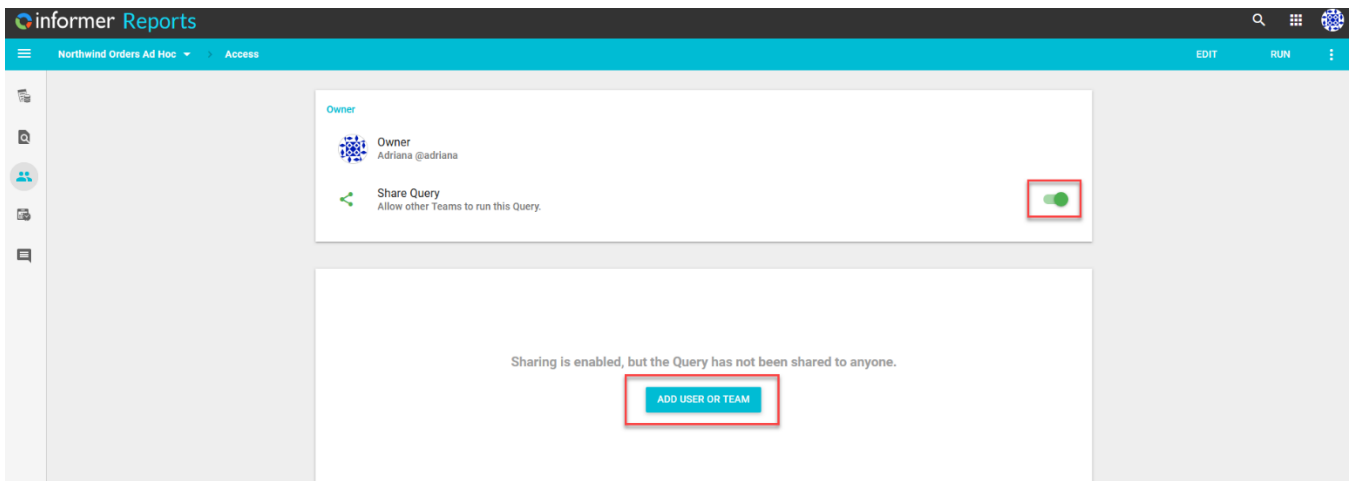


Figure 7: Share Ad hoc Query

Begin typing the name of the User(s) or Team(s) requiring access (Figure 8). Finish selecting all User(s) and/or Team(s) then click "Save". Note that users need read access to the underlying Datasource to run an Ad hoc Query.

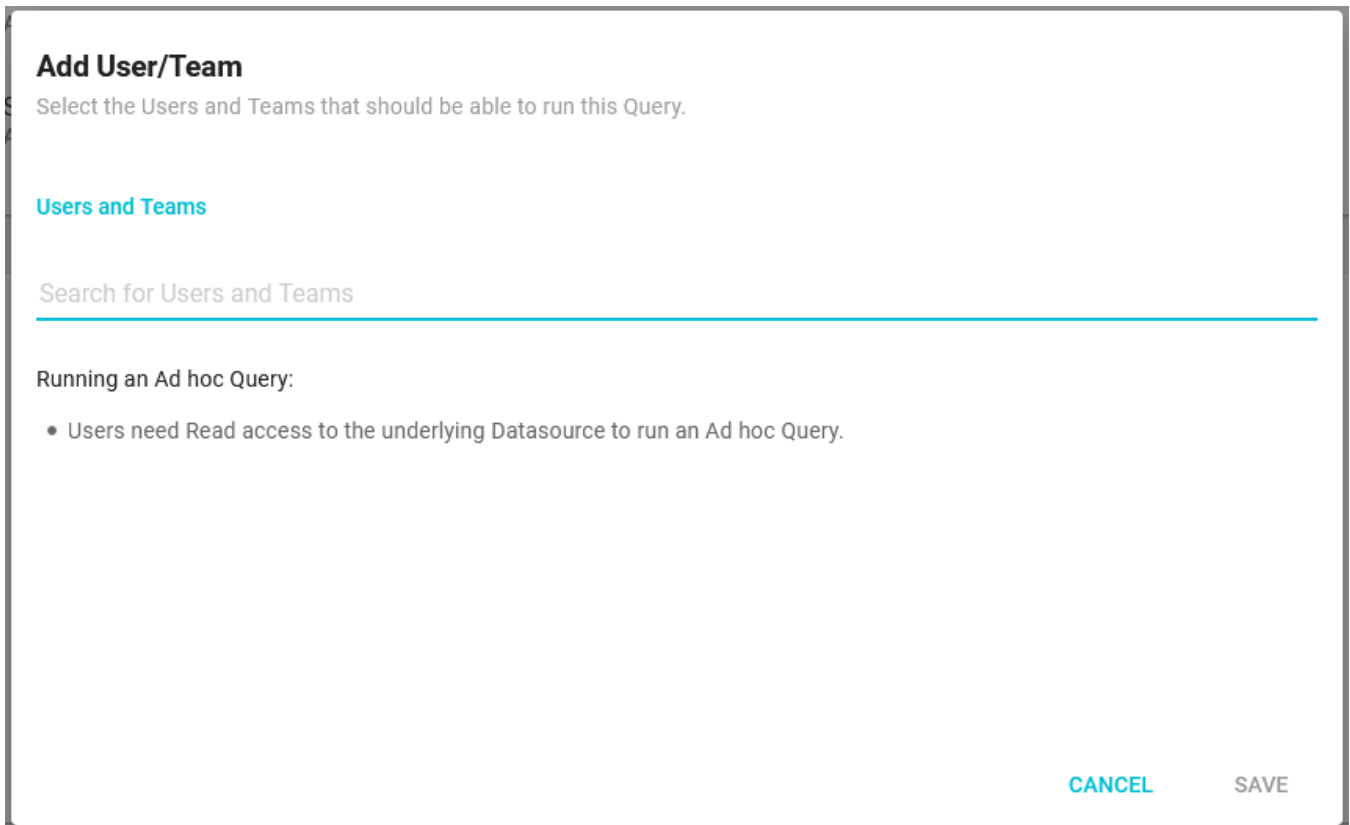


Figure 8: Add User/Team to Ad hoc Query

Removing Access

To remove shared access to User(s) or Team(s) from a Report, choose "Access" within the Report, click on the User or Team to remove and click "Revoke" (Figure 9).

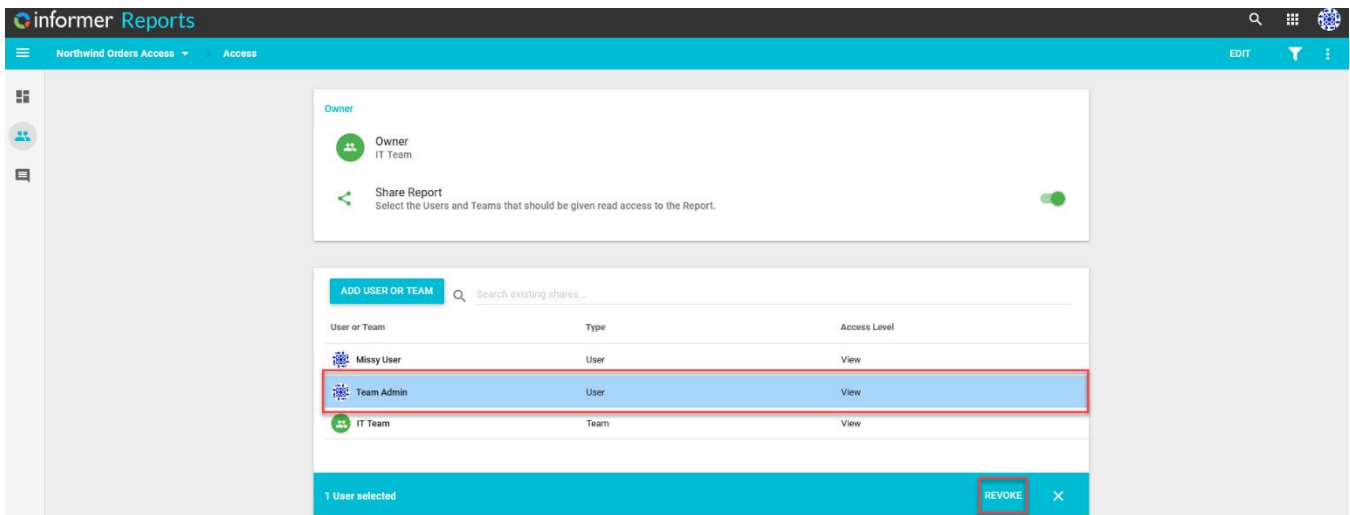


Figure 9: Revoke Access

How Users Work Within Teams

Dataset Role Breakdown

Restrict specific actions on Datasets by a User's Role within a Team and whether content is shared or owned. The table below breaks down the access for each Role:

Role	Permissions for New Content	Permission when shared	Permissions when owned
Member	-None. Member cannot create new Datasets	-View Datasets available to Team -Filter -Save private Filters -Export -Move and format columns -Add groups -Add aggregates -Create pivot table (not save) -Export pivot table -Use Discover to create visuals (not save) -Download visuals -Drill down in visuals -Add/delete comments -View access	-View Datasets available to Team -Filter -Save private Filters -Export -Move and format columns -Add groups -Add aggregates -Create pivot table (not save) -Export pivot table -Use Discover to create visuals (not save) -Download visuals -Drill down in visuals -Add/delete comments -View access
Data Designer	-Create new Dataset by uploading a file (not from a Datasource) -Cannot edit or refresh Dataset	-All Member rights -Create Data View Report from Dataset	-All Member rights -Create Data View report from Dataset -Save pivot table to visuals -Save visuals
Data Wizard	-All Data Designer rights -Create new Dataset from available Datasources	-All Data Designer rights -Cannot refresh -Cannot edit -Cannot save pivot tables -Cannot save visuals -Cannot share	-All Data Designer rights -Edit, copy, and delete -Refresh -Rename -Save filters -Promote private filter to public -Save pivot tables to visuals and configure -Save visuals created using Discover and configure -Change update mode -Add timestamp -Change owner to Team Data Wizard belongs to -Add script fields
Publisher	-All Data Wizard rights	-All Data Wizard rights	-All Data Wizard rights -Share to other Teams
Admin	<i>Admin role should be limited to a few Users. This is not the same as the Informer Administrator login.</i> -All Publisher rights -Add/remove members from a Team -Change members' role in a Team	-All Publisher rights	-All Publisher rights -Change Owner to team Admin belongs to

While Teams determine what data Users can access, Roles determine what rights Users have within Informer. For example, only Users that are knowledgeable about who needs access to specific data are given the Publisher Role.

Report Role Breakdown

Restrict specific actions on Reports with a User's Role within a Team and whether content is shared or owned. The table below breaks down the access for each Role:

Role	Permissions for New Content	Permission when Shared	Permissions when Owned
Member	-None. Member cannot create new Reports	Dashboard/Comparison Board/Data View -Filter -Pin to Homepage -Download visuals -Drill down in visuals -Export Pivot to csv -View and export data -Move columns (Data View only) -Add groups and aggregates (Data View only) -Create Pivot Table (Data View only) -Export (Data View only) -Custom filter available if Dataset is also shared -Add/delete comments Ad hoc Query Report -Run Ad hoc Queries available to Team -Filter -Save filters -Export -Move columns -Add groups and aggregates -Use Discover to create visuals (not save) -Create Pivot Tables (not save) -Add/delete comments	Dashboard/Comparison Board/Data View -Filter -Pin to Homepage -Download visuals -Drill down in visuals -Export Pivot to csv -View and export data -Move columns (Data View only) -Add groups and aggregates (Data View only) -Create Pivot Table (Data View only) -Export (Data View only) -Custom filter available if Dataset is also shared -Add/delete comments Ad hoc Query Report -Run Ad hoc Queries available to Team -Filter -Save Filters -Export -Move columns -Add groups and aggregates -Use Discover to create visuals (not save) -Create Pivot Tables (not save) -Add/delete comments
Data Designer	Dashboard/Comparison Board/Data View -Create reports from available Datasets -Create and manage tags Ad hoc Query Report -Create Ad hoc Queries from available Datasources -Create and manage tags	Dashboard/Comparison Board/Data View -All Member rights Ad hoc Query Report -All Member rights	Dashboard/Comparison Board/Data View -All Member rights -Edit, copy, delete -Assign tags -Move to folder -Rename -Change ownership to Team Ad hoc Query Report -All Member rights -Edit, copy, delete -Assign tags -Move to folder -Rename -Change ownership to Team -Share to any User or Team
Data Wizard	Dashboard/Comparison Board/Data View -All Data Designer rights Ad hoc Query Report -All Data Designer rights	Dashboard/Comparison Board/Data View -All Data Designer rights Ad hoc Query Report -All Data Designer rights -Create Dataset from Ad hoc Query	Dashboard/Comparison Board/Data View - All Data Designer rights Ad hoc Query Report -All Data Designer rights -Create Dataset from Ad hoc Query
Publisher	Dashboard/Comparison Board/Data View -All Data Wizard rights Ad hoc Query Report -All Data Wizard rights	Dashboard/Comparison Board/Data View -All Data Wizard rights Ad hoc Query Report -All Data Wizard rights	Dashboard/Comparison Board/Data View -All Data Wizard rights -Share to other Teams -Generate/view external links Ad hoc Query Report -All Data Wizard rights
Admin	<i>Admin role should be limited to a few Users. This is not the same as the Informer Administrator login.</i> -All Publisher rights -Add/remove members from a Team -Change members' role in a Team		

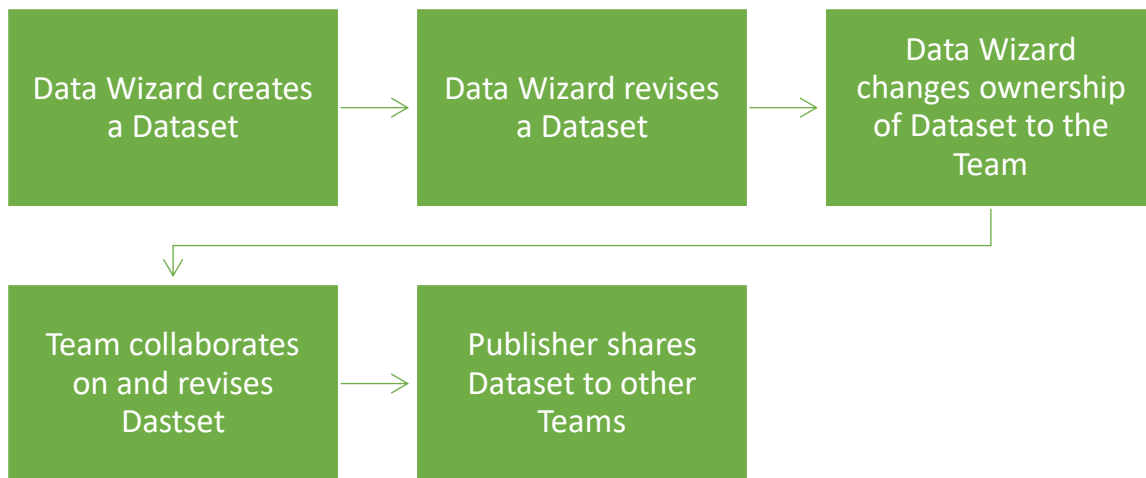
Users on Multiple Teams

Users that are on multiple teams receive additive permissions. This means a User on a Team without access to a particular Mapping and on another Team with access to that Mapping will have access to that Mapping.

Top Level Permissions

Some permissions do not fit neatly into a single Role. These permissions are broken into their own sections and can be configured individually per User. Currently, the only top-level permission is Job creation.

Expected Workflow



This example will cover the permissions associated with building and sharing a Dataset, from start to finish. Consider the following Users and Teams:

Team	Users
HR Team	<ul style="list-style-type: none"> • Candise – Admin • Michael – Publisher • Lisa – Data Wizard • Alan – Designer • Paige – Member HTML
Accounting Team	<ul style="list-style-type: none"> • Samuel – Publisher • Jackson – Designer • Jordan – Member

Candise maps a new Datasource into Informer with HR Data, and makes the HR Team the owner of this Datasource.

Lisa creates a Dataset from that Datasource. She works on it herself until she's ready for feedback from the rest of the Team. At that point, she makes the HR Team the Owner of the Dataset. Paige and Alan can provide input via comments, while Michael and Candise can provide comments or make changes themselves.

Once the Team is satisfied with the final version of the Dataset, Michael shares the Dataset with the Accounting Team. Now all the users from both Teams can see and comment on the Dataset, but only Lisa and Michael and Candise can edit or refresh the Dataset.

Jackson decides to build a Dashboard from the Dataset to highlight the most important data. When he finished, he changes the owner to the Accounting Team, and they can all review it together.



DID YOU KNOW?

Candise could also ask another Team Admin to share certain Mappings to her Team. The rest of the scenario is the same if it's a separate Datasource or just certain content from a pre-existing Datasource.