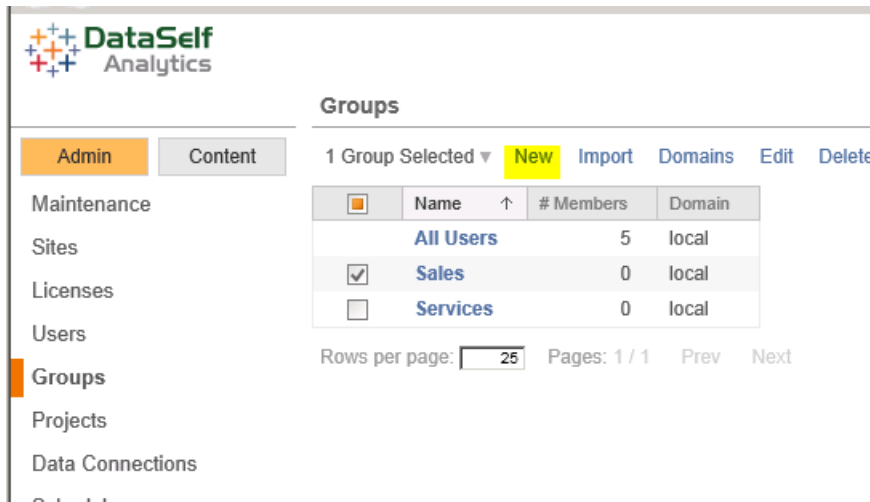


DSA Server Simple Security Setup

In this simple security setup, two choices control permissions: User type (viewer, interactor, etc) and the Group(s) the user is added to.

1. Make Groups



The screenshot shows the DataSelf Analytics interface for the 'Groups' section. The left sidebar contains navigation options: Admin, Content, Maintenance, Sites, Licenses, Users, Groups (highlighted), Projects, and Data Connections. The main content area is titled 'Groups' and shows '1 Group Selected'. A yellow 'New' button is highlighted. Below the navigation are buttons for 'Import', 'Domains', 'Edit', and 'Delete'. A table lists the groups:

<input type="checkbox"/>	Name ↑	# Members	Domain
<input type="checkbox"/>	All Users	5	local
<input checked="" type="checkbox"/>	Sales	0	local
<input type="checkbox"/>	Services	0	local

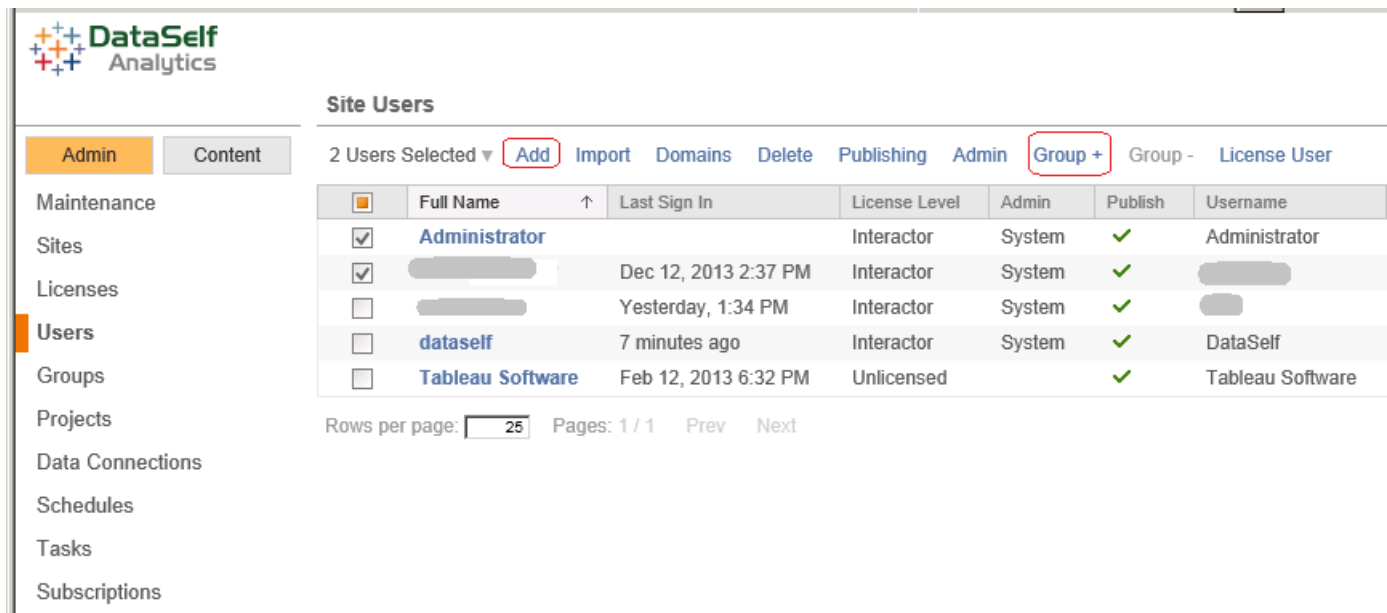
Below the table, it shows 'Rows per page: 25' and 'Pages: 1 / 1' with 'Prev' and 'Next' navigation links.

2. Create Users

"Add" to create new users (by their windows login name)

Add users to a group: Check the user(s) and click on Group +

Click the selected group on the pull-down list that appears.




The screenshot shows the DataSelf Analytics interface for the 'Site Users' section. The left sidebar contains navigation options: Admin, Content, Maintenance, Sites, Licenses, Users (highlighted), Groups, Projects, Data Connections, Schedules, Tasks, and Subscriptions. The main content area is titled 'Site Users' and shows '2 Users Selected'. A red box highlights the 'Add' button. Below the navigation are buttons for 'Import', 'Domains', 'Delete', 'Publishing', 'Admin', 'Group +', 'Group -', and 'License User'. A table lists the users:

<input type="checkbox"/>	Full Name ↑	Last Sign In	License Level	Admin	Publish	Username
<input checked="" type="checkbox"/>	Administrator		Interactor	System	✓	Administrator
<input checked="" type="checkbox"/>	[Redacted]	Dec 12, 2013 2:37 PM	Interactor	System	✓	[Redacted]
<input type="checkbox"/>	[Redacted]	Yesterday, 1:34 PM	Interactor	System	✓	[Redacted]
<input type="checkbox"/>	dataself	7 minutes ago	Interactor	System	✓	DataSelf
<input type="checkbox"/>	Tableau Software	Feb 12, 2013 6:32 PM	Unlicensed		✓	Tableau Software

Below the table, it shows 'Rows per page: 25' and 'Pages: 1 / 1' with 'Prev' and 'Next' navigation links.

3. Make Projects



Projects


Admin | Content | **Add** | Delete | Permissions | Edit

<input type="checkbox"/>	Name	Publisher	Created
<input type="checkbox"/>	Automated Services	dataself	Nov 10 2017
<input type="checkbox"/>	Default	workgroupadmin	Feb 10 2017
<input type="checkbox"/>	Sage 100 Sales	dataself	Nov 10 2017

Rows per page: Pages: 1 / 1 Prev Next

- Maintenance
- Sites
- Licenses
- Users
- Groups
- Projects**
- Data Connections
- Schedules
- Tasks
- Subscriptions

4. Add Groups to Projects




Projects

Admin | Content | Add | Delete | **Permissions** | Edit

<input type="checkbox"/>	Name	Publisher
<input type="checkbox"/>	Automated Services	dataself
<input type="checkbox"/>	Default	workgro
<input checked="" type="checkbox"/>	Sage 100 Sales	dataself

Rows per page: Pages: 1 / 1 Prev

- Maintenance
- Sites
- Licenses
- Users
- Groups
- Projects**
- Data Connections



Permissions: Project

1 Selected project: Sage 100 Sales

User/Group

All Users

Add / Edit Permissions | Assign Permissions to Conte
Permissions are not automal inherited by contained object assign the above permission contained 8 workbooks and (click the link above.

Check user permissions:

- Maintenance
- Sites
- Licenses
- Users
- Groups
- Projects**
- Data Connections
- Schedules

Select the group to add to this project and Submit:

Add / Edit Permissions

Users
 Groups
 Both

- All Users
- Sales
- Services
- Administrator
- ...
- dataself
- Tableau Software

Role: Viewer

	Allow	Deny	Inherited
General			
View:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Write/Web Save:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Delete:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Download/Web Save As:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Move:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Set Permissions:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Workbook			
Filter:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Add Comment:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Comments:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Summary Data:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Underlying Data:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Export Image:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Share Customized:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Web Edit:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Data Source			
Connect:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Project			
Project Leader:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Delete groups by clicking the tiny X

DataSelf Analytics

Permissions: Project

1 Selected project: Sage 100 Sales

User/Group	Role	Project	
All Users	Custom	all selected	edit
Sales	Viewer	all selected	edit

[Add / Edit Permissions](#) | [Assign Permissions to Contents](#)

After adding /deleting all groups, click Assign Permissions to Contents

DataSelf Analytics

Permissions: Project

1 Selected project: Sage 100 Sales

User/Group	Role	Project
All Users	Custom	all selected
Sales	Viewer	all selected

[Add / Edit Permissions](#) | [Assign Permissions to Contents](#)

Review individual permissions:

DataSelf Analytics

Permissions: Project

1 Selected project: Sage 100 Sales

User/Group	Role	Project
All Users	Custom	all selected
Sales	Viewer	all selected

[Add / Edit Permissions](#) | [Assign Permissions to Contents](#)

Permissions are not automatically inherited by contained objects. To assign the above permissions to the contained 8 workbooks and 65 views click the link above.

Check user permissions:

Capability	Allow	Deny
View	✓	
Write/web Save	✓	
Delete	✓	
Download/web Save As	✓	
Move	✓	
Set Permissions	✓	
Filter	✓	
Add Comment	✓	
View Comments	✓	
View Summary Data	✓	
View Underlying Data	✓	
Export Image	✓	
Share Customized	✓	
Web Edit	✓	
Connect	✓	
Project Leader	✓	

5. If there are reports that do not use Extracts (but connect directly to SQL or Cubes), you will need to give these groups permission to Connect to this outside data.

Edit the project permissions:

DataSelf Analytics

Permissions: Project

1 Selected project: Sage 100 Sales

User/Group	Role	Project	
All Users	Custom	all selected	<input type="checkbox"/> edit
Sales	Viewer	all selected	<input type="checkbox"/> edit

[Add / Edit Permissions](#) | [Assign Permissions to Contents](#)

Add / Edit Permissions

Users
 Groups
 Both

- ▶ All Users
- ▶ **Sales**
- ▶ Services
- Administrator
- Chris Courtney
- Chris Fix
- dataself
- Tableau Software

Role: Custom ▼

	Allow	Deny	Inherited
General			
View:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Write/Web Save:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Delete:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Download/Web Save As:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Move:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Set Permissions:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Workbook			
Filter:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Add Comment:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Comments:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Summary Data:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View Underlying Data:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Export Image:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Share Customized:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Web Edit:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Data Source			
Connect:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project			
Project Leader:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Note: the users will also need corresponding SQL and/or cube read rights.