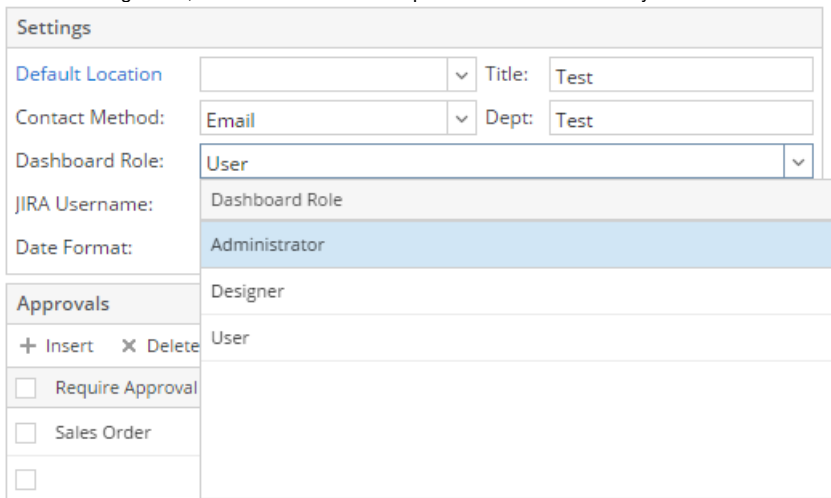


How to setup Dashboard role

Security permission for dashboard can be set through dashboard role.

Here are the steps how to set this up:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**
3. Open an existing user.
4. On Users Entity screen click **User** tab
5. On the Settings area, hit **Dashboard Role** drop down to select role that you would like to setup on the user.



The screenshot shows a 'Settings' form for a user. The 'Dashboard Role' dropdown menu is open, displaying three options: 'Dashboard Role' (highlighted in light blue), 'Administrator' (highlighted in light blue), and 'Designer'. Below the dropdown, there are checkboxes for 'Require Approval', 'Sales Order', and an empty checkbox. The form also includes fields for 'Default Location', 'Contact Method', 'Title', 'Dept', 'JIRA Username', and 'Date Format'.

6. Hit **Save** button for changes to take effect.

Here's a brief differentiation of the said roles:

	Administrator	Designer	User
Connection ADD/EDIT/DELETE	Y	N	N
Connection VIEW	Y	Y	N
Canned panels ADD/EDIT/DELETE	Y	N	N
Company panels ADD/EDIT/DELETE	Y	Y	N
Manage personal dashboard tabs	Y	Y	Y
Assign panels to users	Y	N	N
Personal panels ADD/EDIT/DELETE	Y	Y	N
Assigned panels change query	Y	Y	N
Assigned panels change connection	Y	Y	N
Assigned panels change column properties	Y	Y	Y
Assigned panels change column format	Y	Y	Y
Assigned panels change Rows Retrieved	Y	Y	Y
Assigned panels change Rows Visible	Y	Y	Y



Y = YES, meaning the user has permission or allowed to do such actions.

N = NO, meaning the user has no permission or not allowed to do such actions.

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Entity - TestUser

New Save Search Refresh Delete Undo Additional Archived Reports API Key Enable Two-Step Verification Close

Entity User Comments (0) Attachments (0) Custom Audit Log (8)

Detail User Roles External Module Registered Computers

Username: testuser
Title: Manager
Contact Method: Email
Department: IT

Change Password
✓ Apply ✕ Cancel
New Password:
Confirm Password:

User Options
Maximum Number of Origin Screens Allowed 3
☐ Allow User to only Post Transactions they created
☐ Administrator User
☐ Disable User
☐ User cannot change password
☐ User must change password on next login

Settings
JIRA Username:
Dashboard Role:
Default Location:
Default Role: USER

Approvals
✕ Delete ☒ Layout 🔍 Filter Records (F3)
☐ Require Approval For

Ready Page 1 of 1

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Detail User Roles External Module Registered Computers

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Title: Manager
Contact Method: Email
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User Options
Maximum Number of Origin Screens Allowed 3
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Settings
JIRA Username:
Dashboard Role:
Default Location:
Default Role:

Approvals
✕ Delete ☒ Layout 🔍 Filter Records (F3)
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6. Hit **Save** button for changes to take effect.