How to setup Dashboard role

Security permission for dashboard can be set through dashboard role.

Here are the steps how to set this up:

- Log in as Admin user
 On user's menu panel, go to System Manager folder then click Users

- Open an existing user.
 On Users Entity screen click User tab
 On the Settings area, hit Dashboard Role drop down to select role that you would like to setup on the user.

Settings				
Default Location		✓ Title:	Test	
Contact Method:	Email	v Dept:	Test	
Dashboard Role:	User			~
JIRA Username:	Dashboard Role			
Date Format:	Administrator			
Approvals	Designer			
+ Insert × Delete	User			
Require Approva	-			
Sales Order				

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	Ν	Ν
Connection VIEW	Y	Y	Ν
Canned panels ADD/EDIT/DELETE	Y	Ν	Ν
Company panels ADD/EDIT/DELETE	Y	Y	Ν
Manage personal dashboard tabs	Y	Y	Y
Assign panels to users	Y	Ν	Ν
Personal panels ADD/EDIT/DELETE	Y	Y	Ν
Assigned panels change query	Y	Y	Ν
Assigned panels change connection	Y	Y	Ν
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.

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

tity - User A ew Save Search	h Refresh Delete Undo Additional - Archived Reports API Key 2-	∧ Step Verification Close
ntity User Co	omments (0) Attachments (0) Messages Custom Audit Log (1)	
letail User Role	es External Module Registered Computers	
sername:	User A	Change Password
tle:	Test 👋 🔮	✓ Apply × Cancel
ontact Method:	Email v M	New Password:
epartment:	Test	Confirm Password:
User Options		Settings
Maximum Nur	mber of Origin Screens Allowed 3	Default Role: ADMIN
Allow User	to only Post Transactions they created	Default Location:
✔ Administra		JIRA Username:
Disable Use	er	Dashboard Role:
User canno	ot change password	
User must	change password on next login	
		Approvals
		× Delete 🗄 Layout 🔍 Filter Records (F3)
		Require Approval For
	Ready	Id d Page 1 of 1 ▶

5. On the Settings area, hit Dashboard Role drop down to select role that you would like to setup on the user. Settings

Sectings	
Default Role:	ADMIN
Default Location:	
JIRA Username:	
Dashboard Role:	Administrator
	Dashboard Role
	Administrator
Approvals	Designer
× Delete 🔠 Lay	User

6. Hit Save button for changes to take effect.

Here are the steps how to set this up:

- 1. Log in as Admin user
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 Open an existing user.

4. On Users Entity screen click User tab

tity - TestUser		▲ □
lew Save Searct	h Refresh Delete Undo Additional - Archived Reports API Key	Enable Two-Step Verification Close
Entity User Co	omments (0) Attachments (0) Custom Audit Log (8)	
Detail User Role	External Module Registered Computers	
Username:	testuser	Change Password
Title:	Manager 👋 🔮	✓ Apply X Cancel
Contact Method:	Email v	New Password:
Department:	П	Confirm Password:
User Options		Settings
Maximum Nur	mber of Origin Screens Allowed 3	JIRA Username:
Allow User to only Post Transactions they created		Dashboard Role: 🗸
Administrator User		Default Location: v
Disable User		Default Role: USER 🗸
	ot change password	
User must	change password on next login	Approvals
		× Delete 🗄 Layout 🔍 Filter Records (F3)
		Require Approval For
A A —		
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5. On the Settings area, hit **Dashboard Role** drop down to select role that you would like to setup on the user.

	s External Module Registered Computers		
sername:	testuser	Change Password	
itle:	Manager V	✓ Apply X Cance	el
ontact Method:	Email v M	New Password:	
epartment:	IT	Confirm Password	
		Comminassiona	
User Options		Settings	
Maximum Nu	mber of Origin Screens Allowed 3	JIRA Username:	
Allow User to only Post Transactions they created		Dashboard Role: Administrator	
Administra	, , ,	Default Location: Dashbara Role Default Role: Administrator Default Role: Designer	
Disable Use			Administrator
			Designer
User cannot change password		User	User
		Approvals	
		× Delete 🕮 La	yout 🔍 Filter Records (F3)
		A Delete BB La	
		Require Appro	oval For
			oval For

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