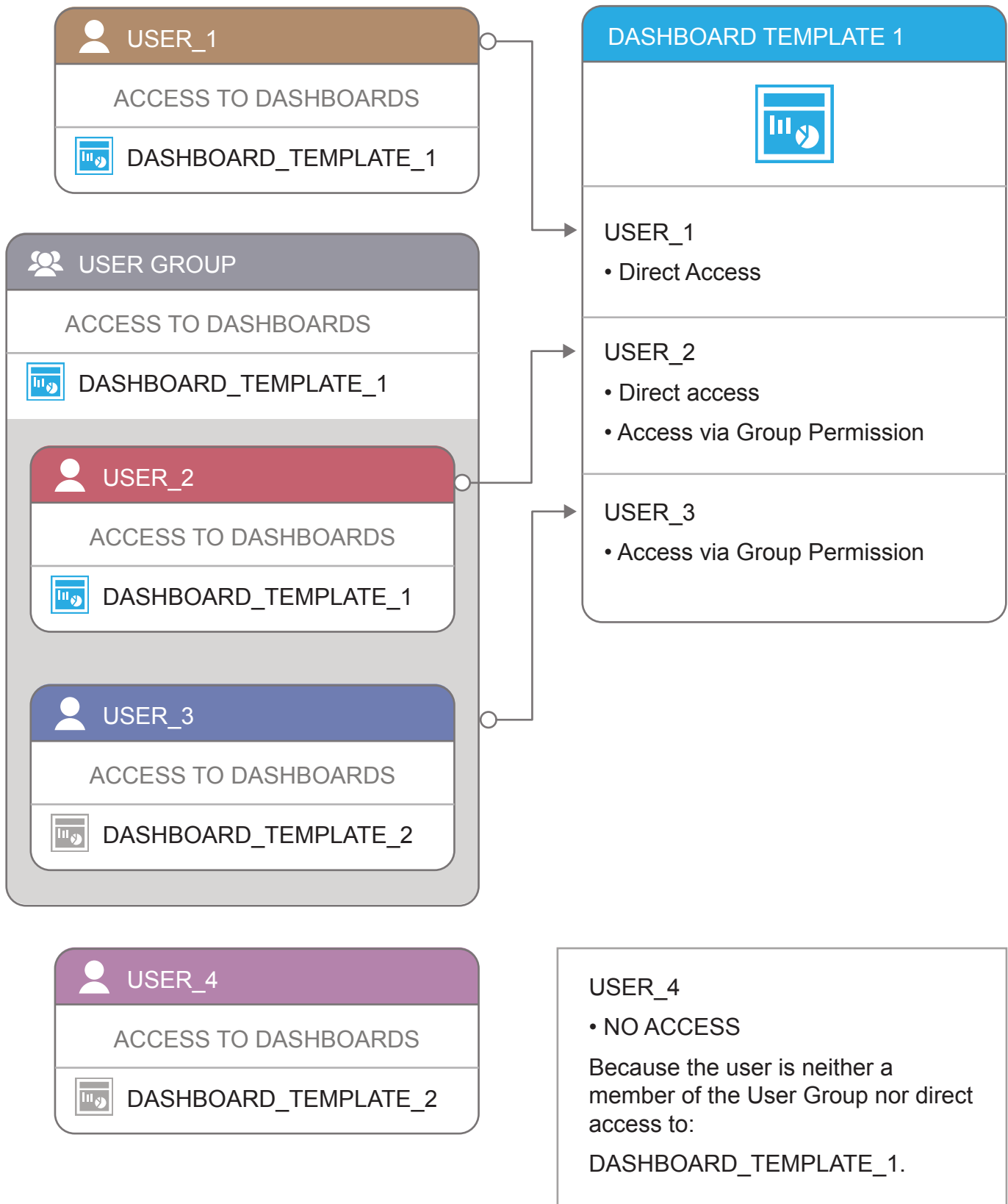


ACCESS TO DASHBOARDS

SECURITY

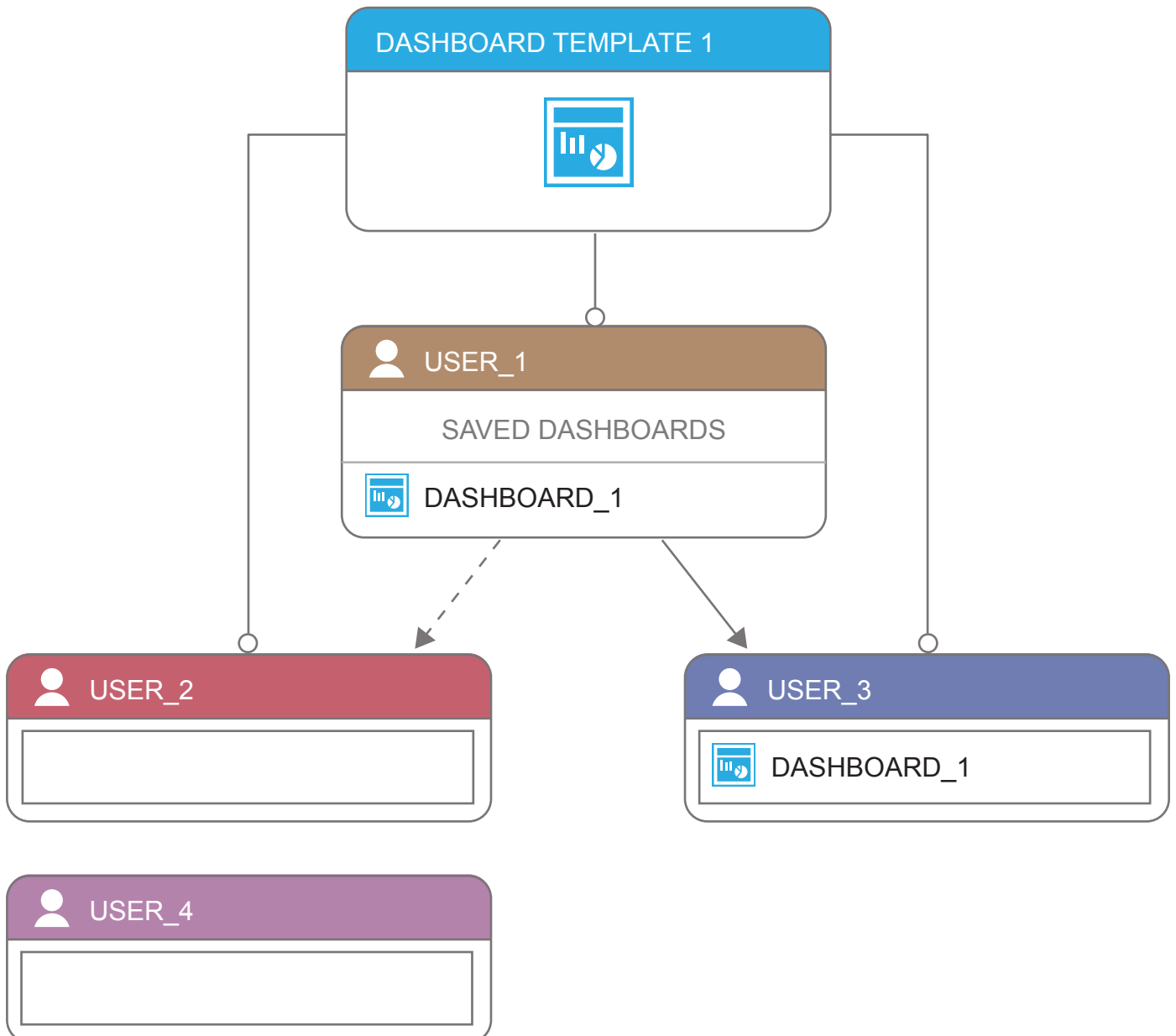


ACCESS TO SAVED DASHBOARDS

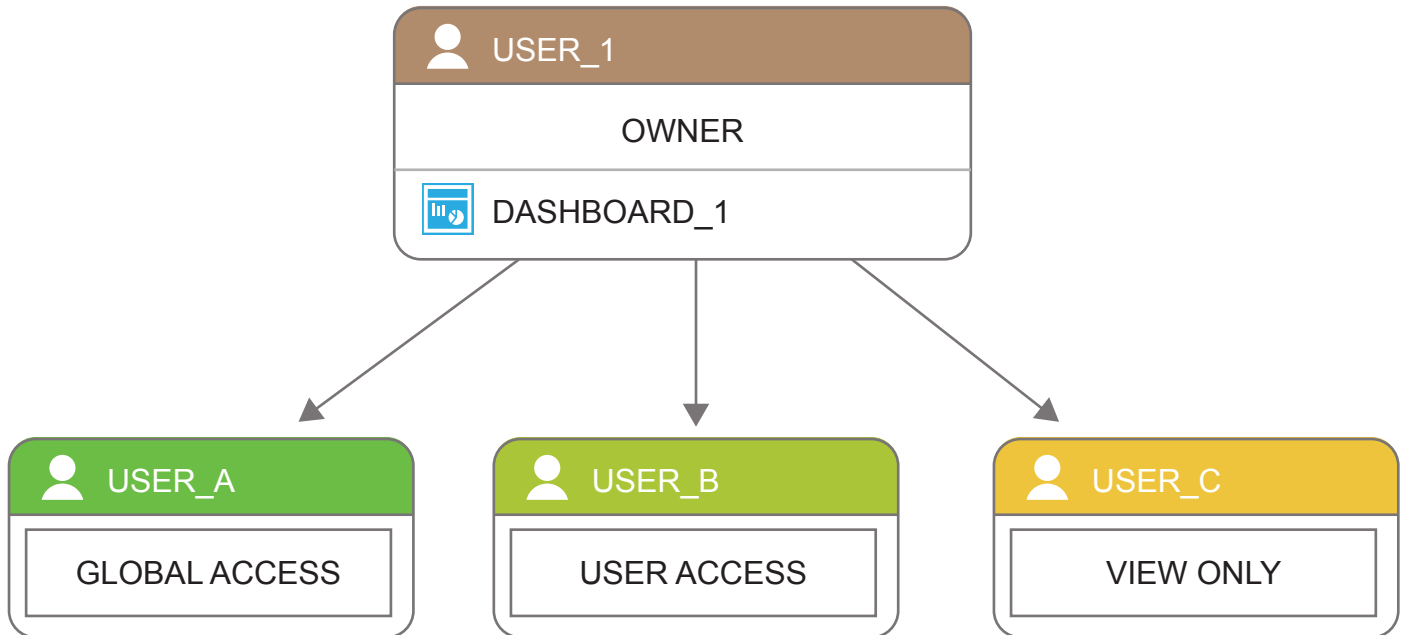
SECURITY

It is possible for USER_1 to share DASHBOARD_1 with USERS 2 & 3 because they have access to DASHBOARD_TEMPLATE_1.
It is not possible to share DASHBOARD_1 with USER_4 because they do not have access to DASHBOARD_TEMPLATE_1.

In order for a user to have access to any specific Dashboard saved by a User, the DASHBOARD owner must share the DASHBOARD with said user. USER_3 has access to DASHBOARD_1 because USER_1 shared it with USER_3. USER_2 does not have access despite the fact that they both have access to DASHBOARD_TEMPLATE_1.



SAVED DASHBOARD can be shared by Owner to other Users with additional permission attributes: Owner, Global Access, User Access, View Only



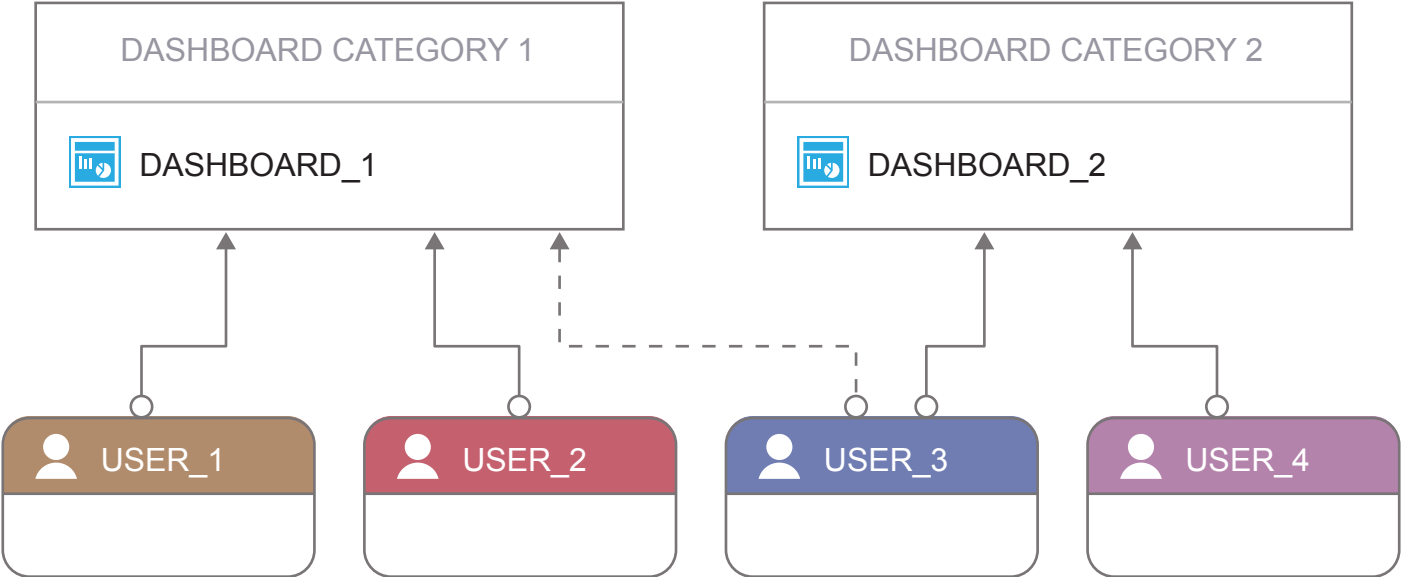
OWNER: Can share and change SAVED DASHBOARD (report or filter values) and re-save/update or save as a completely new dashboard. The Owner can delete an existing SAVED DASHBOARD.

GLOBAL ACCESS: Can share and change SAVED DASHBOARD (report or filter values) and re-save/update or save as a completely new dashboard. **Global Access cannot delete an existing SAVED DASHBOARD.**

USER ACCESS: can change an existing SAVED DASHBOARD (report or filter values) and re-save as a completely new dashboard. **User Access cannot update or delete an existing SAVED DASHBOARD.**

VIEW ONLY: can only see SAVED DASHBOARD but does have the ability to change report or filter values. **'View Only' cannot re-save, update, or delete SAVED DASHBOARD.**

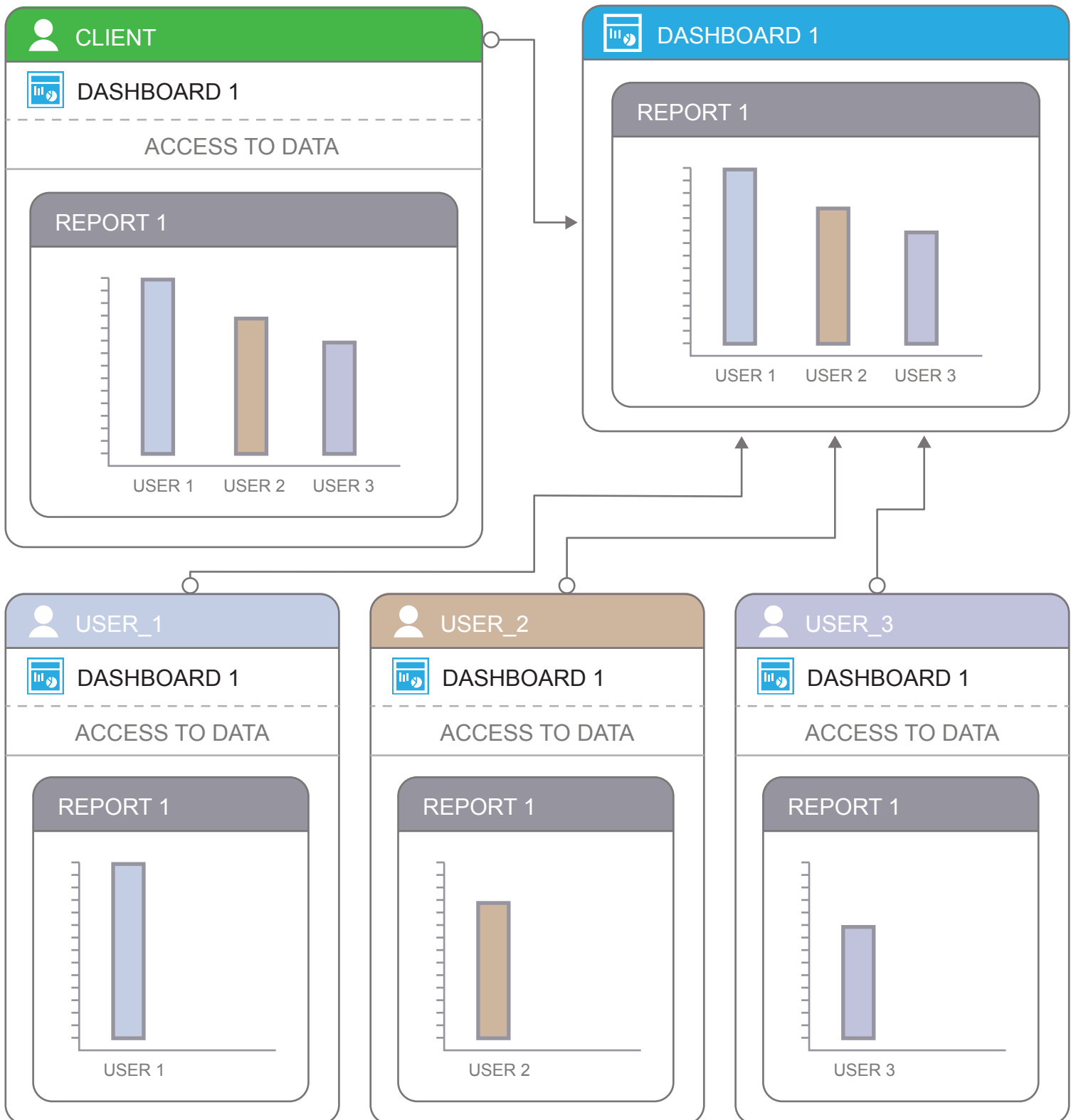
USER has access to the DASHBOARD CATEGORY if they have access to at least one DASHBOARD included within said DASHBOARD CATEGORY.



ACCESS TO DATA

SECURITY

In addition to Dashboard security, RockDaisy provides security at the Data level. The Data can be displayed based on RockDaisy User Id or any other RockDaisy identifier.



In the Usage example on the prior page: The Client has 3 customers, and each customer wants to have a report that shows their orders and total revenue. The Client may use the same exact report for all customers but the data would be shown for each customer based on their User Id. This scenario requires having Customer User Id included in the dataset filtering logic.

If it's preferable to use Client side Customer User Ids, RockDaisy provides the following Filter Variable:

@RockDaisyUserCustomField

This Filter Variable can be populated with custom Client side Customer IDs.

Other Data Level Security Filter Variables include:

@RockDaisyUserId

@RockDaisyUserGroupId

@RockDaisyUserGroupCustomField

These Filter Variables are already predefined in the RockDaisy system and do not require Filter creation.

The screenshot shows a web interface for configuring a report. At the top left, there is a hamburger menu icon and the word "REPORT". Below this are three buttons: "SAVE", "DELETE", and "COPY". A horizontal navigation bar contains four tabs: "PROPERTIES", "PARAMETERS", "DESIGN PREVIEW", and "PUBLISH SHORTCUT". The "PARAMETERS" tab is currently selected. Below the tabs is a table with three columns: "DATASET PARAMETER", "STATIC", and "FILTER VARIABLE". The first row of the table has the following content: "@Dataset Parameter 1", an unchecked checkbox, and a search input field containing "RockDaisy". A dropdown menu is open below the search field, listing the following options: "Select Filter Variable", "@RockDaisyUserId", "@RockDaisyUserGroupId", "@RockDaisyUserGroupCustomField", and "@RockDaisyUserCustomField".

DATASET PARAMETER	STATIC	FILTER VARIABLE
@Dataset Parameter 1	<input type="checkbox"/>	RockDaisy

- Select Filter Variable
- @RockDaisyUserId
- @RockDaisyUserGroupId
- @RockDaisyUserGroupCustomField
- @RockDaisyUserCustomField