

# eazyBI

**Managing data access in eazyBI**

**Mārtiņš Vanags, 25.05.2018, Riga**

**klusums** (*en: silence*)

*(n.) essential part of the Latvian  
style of communication*

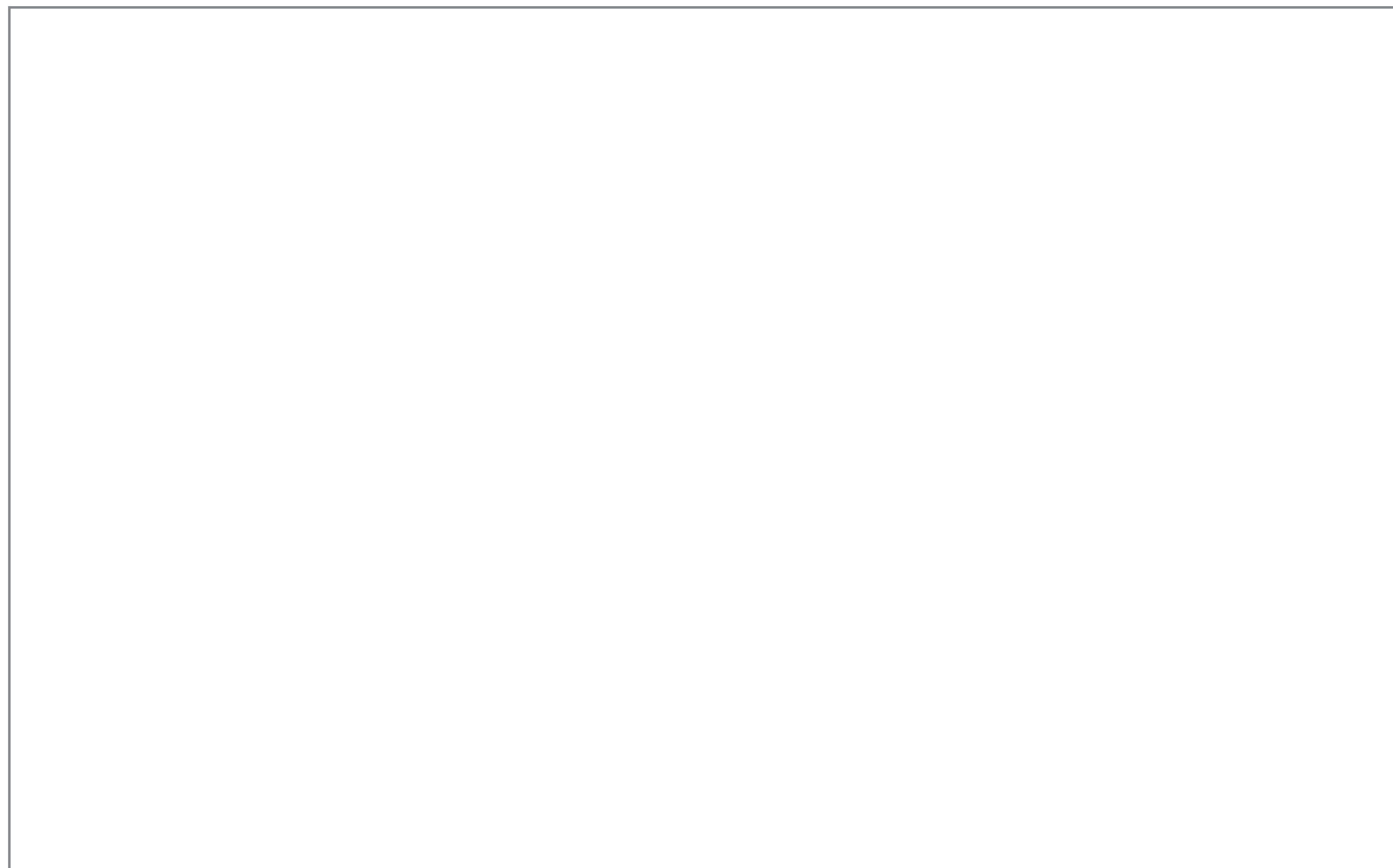


# Mārtiņš Vanags

*“I like active lifestyle and sharing”*



# Nr of happy eazyBI customers - latest trend

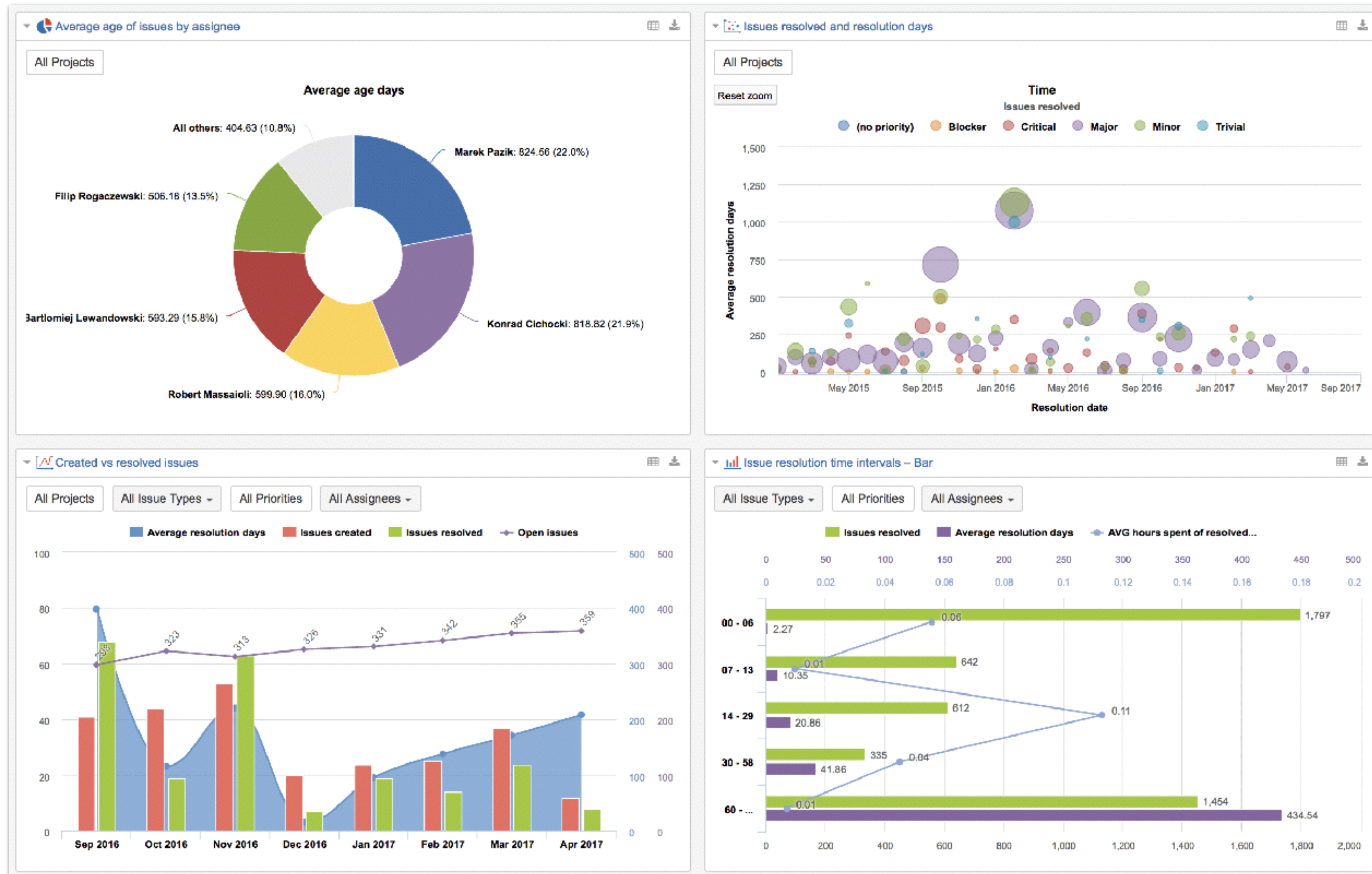


# Nr of happy eazyBI customers - latest trend

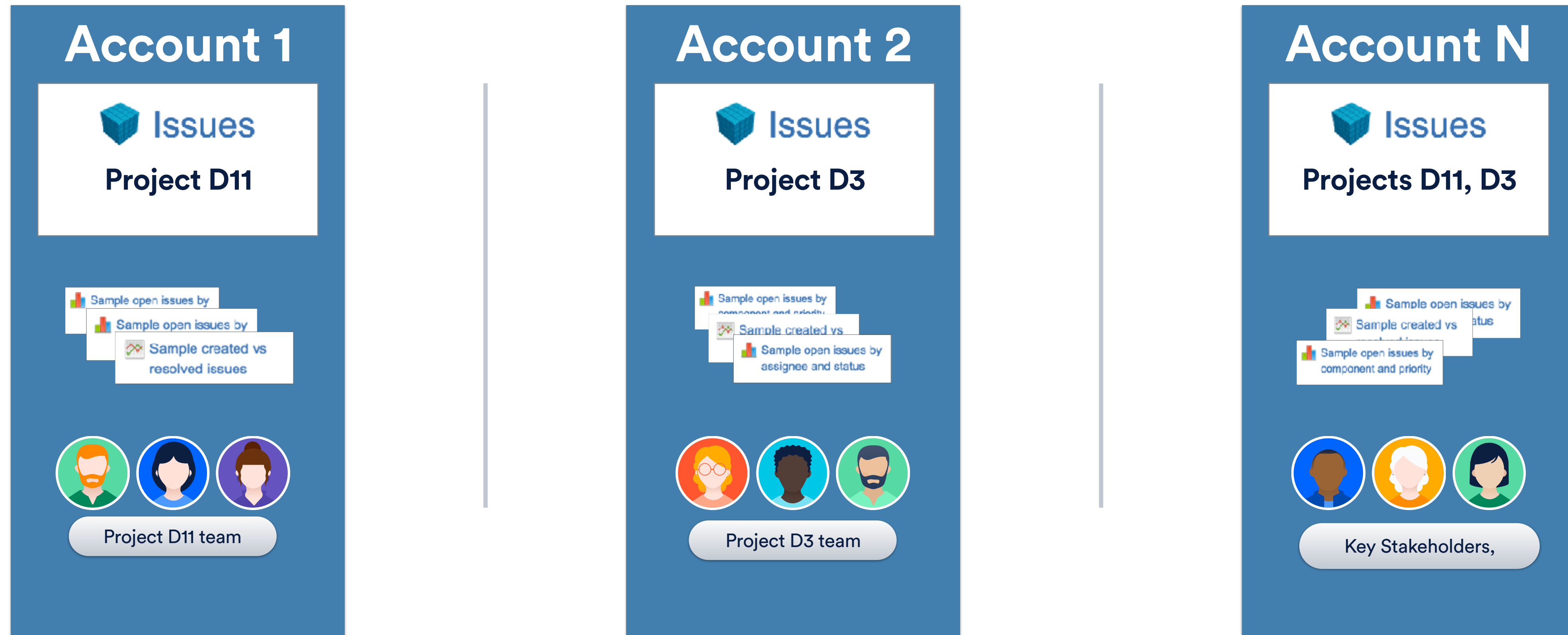
**They are Happy!**



# eazyBI - customised reports and dashboards



# Restrict access using many eazyBI accounts



# Who can access and what data on eazyBI account?

Name	Email	Role	Actions
Martins Vanags (admin)	martins.vanags@eazybi.com	Owner	
Anna Linda (alinda)	Anna.Linda@example.com	User	<a href="#">Remove</a>
jira-software-users (group)		Dashboards viewer	<a href="#">Remove</a>
Duncan Snow (dsnow)	Duncan.Snow@example.com	Viewer	<a href="#">Remove</a>



# Who can access and what data on eazyBI account?

Application	Source selection	Created	Cube	Status	Actions
 Jira	User: admin Projects: D11, D3	2 months ago	Issues	Imported 25 minutes ago	Import Edit ...

Automatic daily import is scheduled for all source applications. If you want to refresh data now then press **Import** button.

Add new source application

# Who can access and what data on eazyBI account?

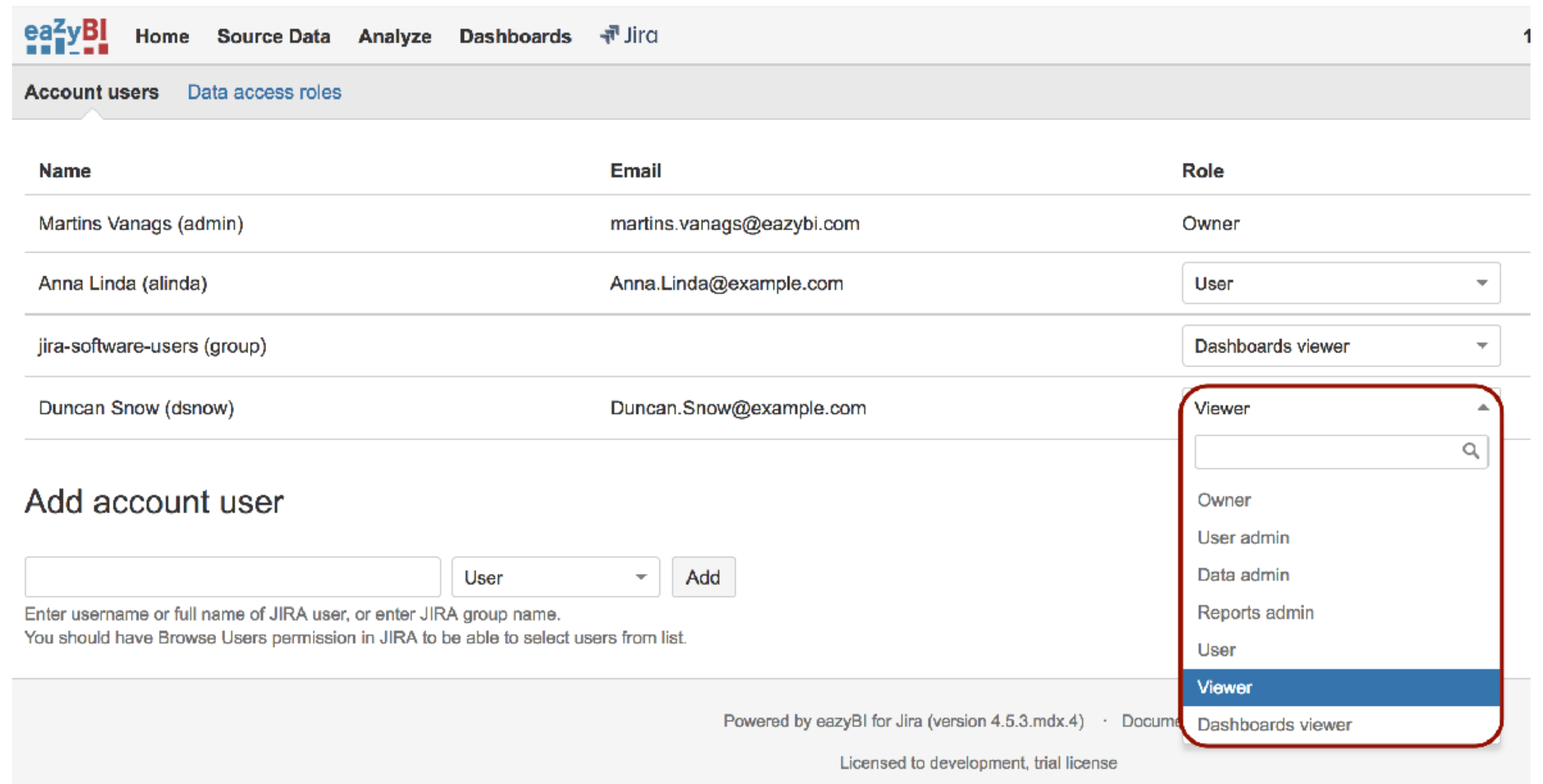
The screenshot shows the eazyBI interface with the 'Jira' menu item selected. The main heading is 'Jira import options'. Below this are four tabs: 'General', 'Add-ons', 'Custom fields', and 'Additional options'. The 'General' tab is active. Under the heading 'Jira projects', there are two radio buttons: 'Projects' (selected) and 'Categories'. Below this is a list of Jira projects with checkboxes:

- DEMO 001 (D11)
- DEMO 002 (D2)
- DEMO 003 (D3)
- Demo 004 (D4)
- Folio (FO)
- IT Service desk (ISD)
- ITSM Project (IP)
- Kanban Style (KS)
- Program overview (PO)

The interface also includes a top navigation bar with 'Home', 'Source Data', 'Analyze', 'Dashboards', and 'Jira'. On the right side of the top bar, there is a user profile dropdown, a settings gear icon, a help icon, and a dropdown menu showing '1 - ECD Live Demo'.

# 7 User roles for eazyBI users

- Dashboard viewer
- Viewer
- User
- Reports admin
- Data admin
- User admin
- Owner



The screenshot displays the eazyBI user management interface. At the top, there is a navigation bar with the eazyBI logo and links for Home, Source Data, Analyze, Dashboards, and Jira. Below this, there are tabs for Account users and Data access roles. The main content area features a table with columns for Name, Email, and Role. The table lists four users: Martins Vanags (admin) as Owner, Anna Linda (alinda) as User, jira-software-users (group) as Dashboards viewer, and Duncan Snow (dsn timer) as User. Below the table is a section for adding a new account user, which includes a text input field, a role dropdown menu (currently set to User), and an Add button. A search dropdown menu is open, showing a list of roles: Viewer, Owner, User admin, Data admin, Reports admin, User, Viewer (highlighted), and Dashboards viewer. The footer of the page contains the text: Powered by eazyBI for Jira (version 4.5.3.mdx.4) · Documented · Licensed to development, trial license.

Name	Email	Role
Martins Vanags (admin)	martins.vanags@eazybi.com	Owner
Anna Linda (alinda)	Anna.Linda@example.com	User
jira-software-users (group)		Dashboards viewer
Duncan Snow (dsn timer)	Duncan.Snow@example.com	User

Add account user

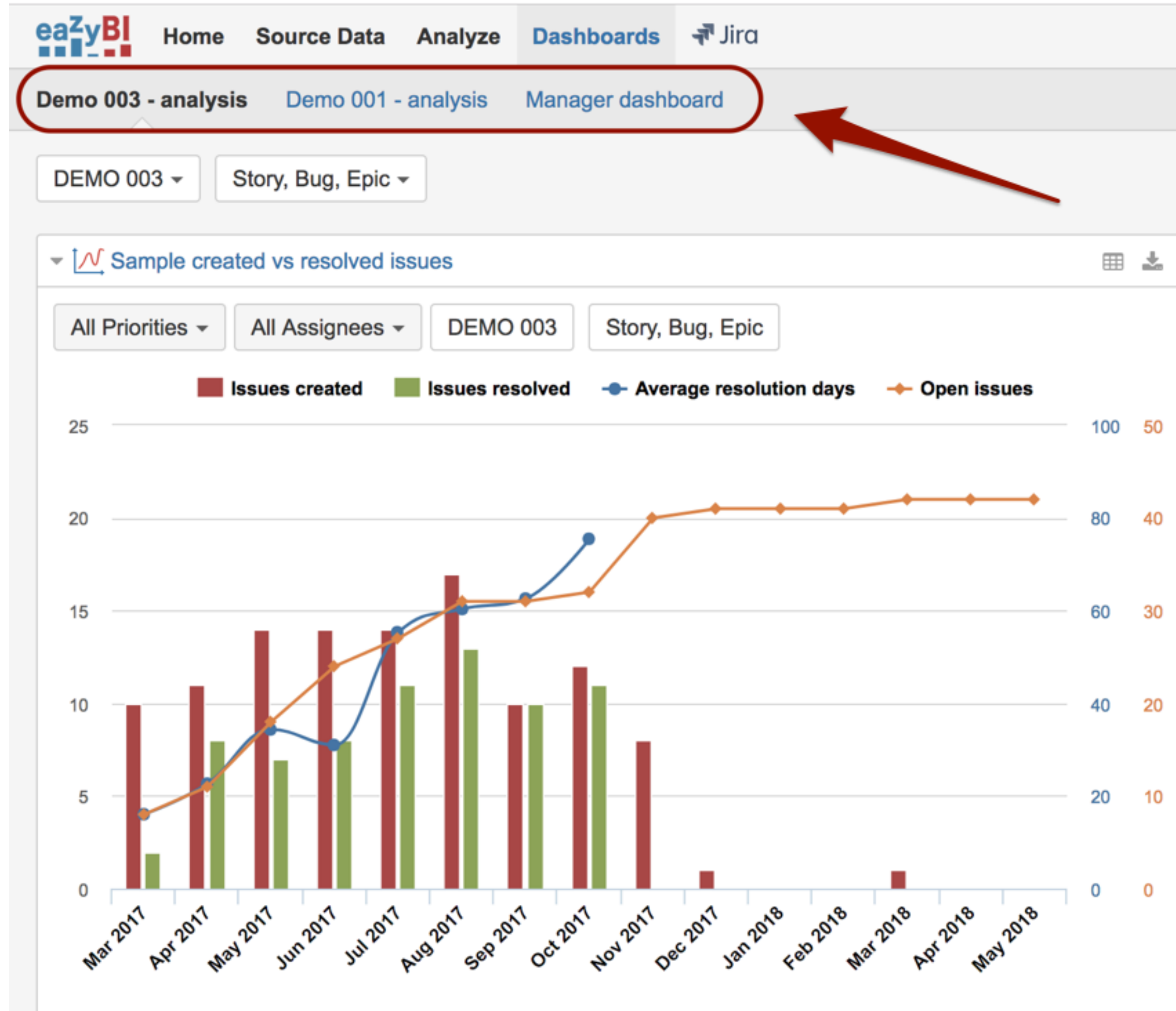
User Add

Enter username or full name of JIRA user, or enter JIRA group name.  
You should have Browse Users permission in JIRA to be able to select users from list.

Viewer  
Owner  
User admin  
Data admin  
Reports admin  
User  
Viewer  
Dashboards viewer

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# eazyBI dashboards to organise and share



# Report folders



Home

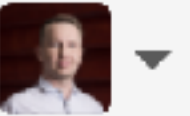
Source Data

Analyze

Dashboards

Jira

1 - ECD 2018 Demo



Issues

Empty



Size: 7.9 MB Last import: 2 minutes ago

Views:



Search



New report

New folder

Import reports

Export reports 16



Daily statistics - Demo 001



Daily statistics - Demo 003



Manager reports



Samples



Samples Jira Software



Cumulative issues resolved (trendline)



Issue resolution time intervals



Issues history analysis by time

# Report folders



Home

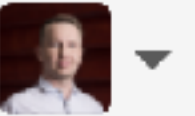
Source Data

Analyze

Dashboards

Jira

1 - ECD 2018 Demo



Issues

Empty



Size: 7.9 MB Last import: 2 minutes ago

Views:



Search



New report

New folder

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Daily statistics - Demo 001



Daily statistics - Demo 003



Samples



Samples Jira Software



Issue resolution time intervals



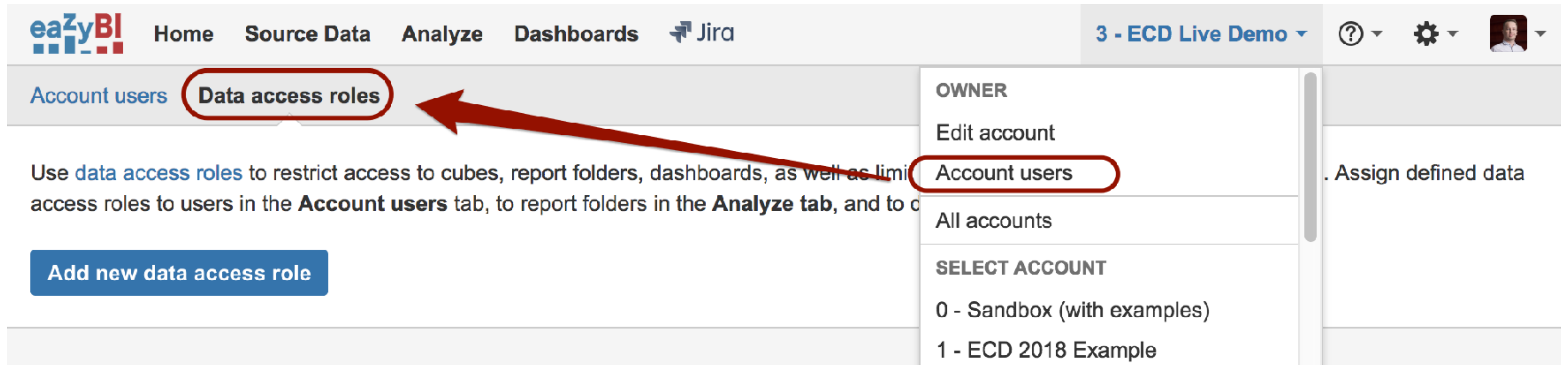
Issues history analysis by time



# **How to restrict access to report, dashboard or dimension?**

# How to restrict access to report, dashboard or dimension?

## DATA ACCESS ROLES



The screenshot displays the eazyBI user interface. At the top, the navigation bar includes the eazyBI logo, 'Home', 'Source Data', 'Analyze', 'Dashboards', and 'Jira'. On the right, there is a dropdown menu for '3 - ECD Live Demo', a help icon, a settings icon, and a user profile icon.

In the main content area, the 'Account users' tab is active, and the 'Data access roles' sub-tab is highlighted with a red circle. A red arrow points from this sub-tab to a dropdown menu that is open, showing a list of roles. The 'Account users' role in the dropdown is also highlighted with a red circle.

Below the navigation bar, there is a text block explaining the purpose of data access roles: "Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access roles to users in the **Account users** tab, to report folders in the **Analyze tab**, and to c". Below this text is a blue button labeled "Add new data access role".

The dropdown menu contains the following items:

- OWNER
- Edit account
- Account users
- All accounts
- SELECT ACCOUNT
- 0 - Sandbox (with examples)
- 1 - ECD 2018 Example





# Use Case 1 - dashboards and report folders by business role

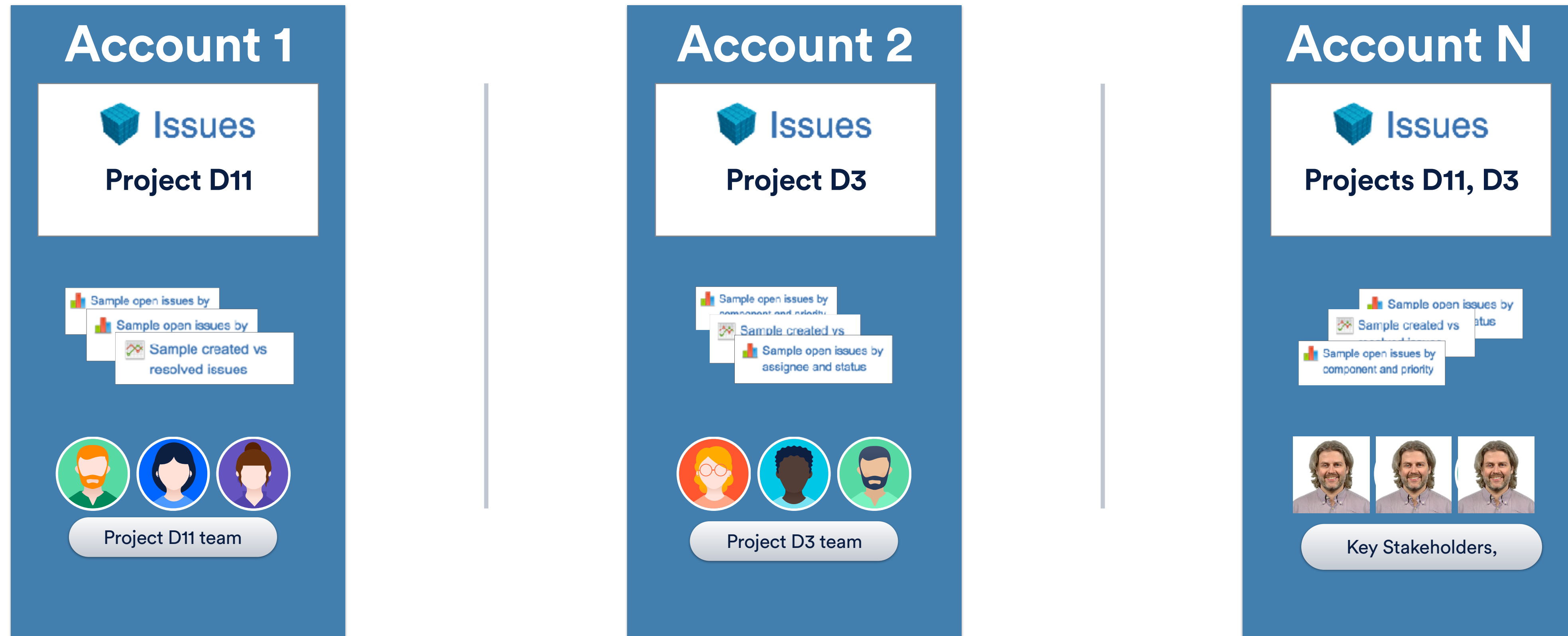




## Key Stakeholders





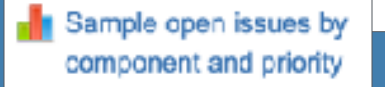

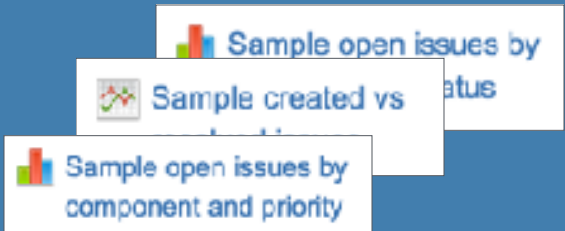
# Approach - many eazyBI accounts



# Alternative - single account and restrictions for dashboards

## Account 1

 Issues  
Projects D11, D3



Key Stakeholders,  
Project D11 team  
Project D3 team

eaZyBI Home Source Data Analyze Dashboards Jira 1 - ECD Live Demo ? ⚙️ 👤

Account users **Data access roles**

Role name	Cubes	Folders	Dashboards	Dimensions	Actions
MG	(unrestricted)		Compare projects, Manager dashboard		Edit Delete
Team1	(unrestricted)		Demo 001 - analysis		Edit Delete
Team2	(unrestricted)		Demo 003 - analysis		Edit Delete

Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access to a subset of dimension members. Assign defined data access roles to users in the **Account users** tab, to report folders in the **Analyze tab**, and to dashboards in the **Dashboards tab**.

[Add new data access role](#)

# Alternative - single account and restrictions for dashboards



Name	Email	Role	Data access roles	Actions
Martins Vanags (admin)	martins.vanags@eazybi.com	Owner	(unrestricted access)	
Anna Linda (alinda)	Anna.Linda@example.com	Reports admin	(unrestricted access)	Remove
Duncan Snow (dsnow)	Duncan.Snow@example.com	User	MG edit	Remove
jira-projectA (group)		Dashboards viewer	Team2 edit	Remove
David Sand (dsand)	David.Sand@example.com	Viewer	Team1 edit	Remove

- Key Stakeholders,
- Project D11 team
- Project D3 team


# Alternative - single account and restrictions for dashboards

The screenshot shows the eazyBI Jira interface with a modal window titled "Dashboards data access roles". The modal contains a table with two columns: "Dashboard" and "Data access roles". The table lists five dashboards and their corresponding data access roles. The "Issue Type overview" dashboard has a placeholder text "Select data access roles". At the bottom of the modal are "Save" and "cancel" buttons. In the background, a dashboard titled "Compare projects" is visible, showing a line chart with data points for March, April, and May 2017. The top navigation bar includes "Home", "Source Data", "Analyze", "Dashboards", and "Jira". The top right corner shows "1 - ECD Live Demo" and a user profile icon. The bottom of the page has a footer: "Powered by eazyBI for Jira (version 4.5.4.mdx.6) · Documentation" and "Licensed to development. trial license".


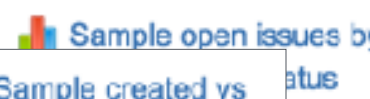
Dashboard	Data access roles
Compare projects	MG ×
Demo 003 - analysis	Team2 ×
Demo 001 - analysis	Team1 ×
Manager dashboard	MG ×
Issue Type overview	Select data access roles


# Restrict access to report folders


**Account 1**


 **Issues**

**Projects D11, D3**





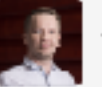


Key Stakeholders,

Project D11 team

Project D3 team

eaZyBI Home Source Data Analyze Dashboards Jira

1 - ECD Live Demo ? ⚙️ 

Account users **Data access roles**

Role name	Cubes	Folders	Dashboards	Dimensions	Actions
MG	(unrestricted)	Manager reports	Compare projects, Manager dashboard		Edit Delete
Team1	(unrestricted)	Daily statistics - Demo 001	Demo 001 - analysis		Edit Delete
Team2	(unrestricted)	Daily statistics - Demo 003	Demo 003 - analysis		Edit Delete

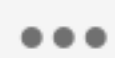
Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access to a subset of dimension members. Assign defined data access roles to users in the **Account users** tab, to report folders in the **Analyze tab**, and to dashboards in the **Dashboards tab**.

[Add new data access role](#)

# Restrict access to report folders

## Issues

Empty



Size: 7.9 MB Last import: about 8 hours ago

Views:



Search



New report

New folder

Import reports

Export reports 17



Daily statistics - Demo 001



Daily statistics - Demo 003



Manager reports



Samples



Samples Jira Software



Cumulative issues resolved (trendline)



Issue resolution time intervals



Issues history analysis by time






Use Case 2 - Jira-user group  
should not be able to analyse  
and see dimension cube  
“Reporter”


# Approach - one eazyBI account & Data access roles

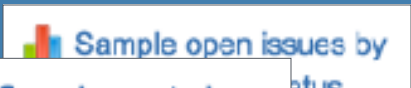
**Account 1**


 **Issues**


**Projects D11, D3**


 Sample open issues by component and priority

 Sample created vs status

 Sample open issues by status









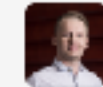


Key Stakeholders,

Project D11 team

Project D3 team

 Home Source Data Analyze Dashboards  Jira

1 - ECD Live Demo   

Account users **Data access roles**

Role name	Cubes	Folders	Dashboards	Dimensions	Actions
MG	(unrestricted)	Manager reports	Compare projects, Manager dashboard		<a href="#">Edit</a> <a href="#">Delete</a>
Team1	Issues	Daily statistics - Demo 001	Demo 001 - analysis	<b>Reporter</b>	<a href="#">Edit</a> <a href="#">Delete</a>
Team2	(unrestricted)	Daily statistics - Demo 003	Demo 003 - analysis		<a href="#">Edit</a> <a href="#">Delete</a>

Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access to a subset of dimension members. Assign defined data access roles to users in the **Account users** tab, to report folders in the **Analyze** tab, and to dashboards in the **Dashboards** tab.

Add new data access role

# Approach - one eazyBI account & Data access roles



Home

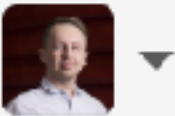
Source Data

Analyze

Dashboards

Jira

1 - ECD Live Demo



## Update data access role

Role name\*

Team1

Restricted cubes

Issues

Restrict access only to selected cubes. If none is selected then no cube restrictions will be added by this role.

## Dimension restrictions

Limit access to a subset of dimension members. Please read [data access roles documentation](#) for more detailed description and examples.

Dimension	Hierarchy	Bottom level	Members	Actions
Reporter	Default	User	(no access)	Remove
				Add

**Update** or [back](#)

# Approach - one eazyBI account & Data access roles

eaZyBI Home Analyze Dashboards Jira 1 - ECD Live Demo ?

Issues > Save New Open

**"Reporter" dimension is not there**

Dimensions

▶ Measures	▶ Project	▶ Assignee	▶ Issue Type
▶ Priority	▶ Status	▶ Resolution	▶ Affects Version
▶ Fix Version	▶ Security Level	▶ Issue	▶ Logged by
▶ Label	▶ Time	▶ Transition Status	▶ Transition
▶ Transition Author	▶ Age interval	▶ Resolution interval	

Agile show 3 dimensions

Pages

Drag here if needed

Columns Drag dimensions here

Rows

Drag dimensions here

Table Bar Line Pie Scatter Timeline Map Gantt Gauge




Drag at least one dimension to columns and one dimension to rows to query data.







Use Case 3 - team members should not drill into year level (to see quarters, months, days)

# Approach - one eazyBI account & Data access roles

## Account 1

 **Issues**  
Projects D11, D3



Key Stakeholders,  
Project D11 team  
Project D3 team

eazyBI Home Source Data Analyze Dashboards Jira 1 - ECD Live Demo ? ⚙️ 👤

Account users **Data access roles**

Role name	Cubes	Folders	Dashboards	Dimensions	Actions
MG	(unrestricted)	Manager reports	MG - dashboard		Edit Delete
Team1	Issues	Daily statistics - Demo 001	Demo 001 - analysis	Reporter	Edit Delete
Team2	Issues	Daily statistics - Demo 003	Demo 003 - analysis	<b>Time</b>	Edit Delete

Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access to a subset of dimension members. Assign defined data access roles to users in the **Account users** tab, to report folders in the **Analyze tab**, and to dashboards in the **Dashboards tab**.

[Add new data access role](#)

# Approach - one eazyBI account & Data access roles



Home

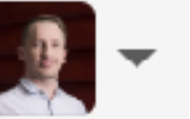
Source Data

Analyze

Dashboards

Jira

1 - ECD Live Demo



## Update data access role

Role name\*

Team2

Restricted cubes

Issues x

Restrict access only to selected cubes. If none is selected then no cube restrictions will be added by this role.

## Dimension restrictions

Limit access to a subset of dimension members. Please read [data access roles documentation](#) for more detailed description and examples.

Dimension	Hierarchy	Bottom level	Members	Actions
Time	Default	Year	All Times	Remove
				Add

**Update** or back

# Approach - one eazyBI account & Data access roles

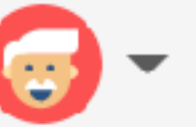


Home

Dashboards

Jira

1 - ECD Live Demo



Demo 003 - analysis

Issues resolved by quarters



DEMO 001

Issues resolved - monthly trend



DEMO 001

	Issues resolved
- 2017	93
- 2018	4

Issues by statuses



DEMO 001

	Issues resolved	
	- 2017	- 2018
Story	40	3
Sub-task	6	
Bug	26	
Epic	3	1
Data task	9	
Test task	9	





**Live demo & hands on**





**#Questions**

**docs.eazybi.com**  
**community.eazybi.com**  
**support@eazybi.com**