## Functions

The set of functions that a role is permitted to access within the system are listed in the function table below. Depending on the function, the function may be set as on or off i.e. Favourites or permissions set using a C R U D list i.e. Report Access:

* **C**reate – create new reports, dashboards etc.
* **R**ead – read reports, dashboards etc.
* **U**pdate – update reports, dashboards etc.
* **D**elete – delete reports, dashboards etc.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Configuration Item** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| **General** |  |  |  |  |
| Report Access | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D |
| User Profile |  |  | √ |  |
| Draft Content List | √ | √ | √ | √ |
| Favourites | √ | √ | √ | √ |
| Export Report Settings | √ | √ | √ | √ |
| Export Reports to CSV | √ | √ | √ | √ |
| Error Email Link |  |  |  |  |
| Error Stacktrace |  |  | √ | √ |
| Export Reports and Dashboards to DOC | √ | √ | √ | √ |
| Export Content to PDF | √ | √ | √ | √ |
| Export Reports and Dashboards to XLS | √ | √ | √ | √ |
| Bookmarks and Snapshots | √ | √ | √ | √ |
| Hide Print on Reports and Dashboards |  |  |  |  |
| **Dashboard** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Personal Dashboard | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D | ☑ C  ☑ R  ☑ U  ☑ D |
| Hide Dashboard Maximise Report |  |  |  |  |
| Hide Dashboard Report Menu |  |  |  |  |
| Refresh Dashboard Reports |  |  |  |  |
| Public Dashboards | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D |
| Disable Add Existing Tab |  |  |  |  |
| Show Draft Dashboards |  |  | √ | √ |
| **Browse** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Hide Browse Page |  |  |  |  |
| Hide Advanced Report Search |  |  |  |  |
| Hide Columns Option (Browse Page) |  |  |  |  |
| Hide Report Details (Browse Page) |  |  |  |  |
| Draft Public Reports |  |  | √ | √ |
| **Report Builder** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Report Types |  |  | √ |  |
| Public Reports | ☑ C  ☑ R  □ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  □ U  ☑ D | ☑ C  ☑ R  □ U  ☑ D |
| Versioned Reports | √ | √ | √ | √ |
| Sub Queries | √ | √ | √ | √ |
| Ad Hoc Reports |  |  | √ |  |
| Access Filter | √ | √ | √ | √ |
| Related Content | √ | √ | √ | √ |
| CSV Reports |  |  | √ |  |
| Advanced CSV Functionality |  |  | √ |  |
| Custom Query Filters |  |  | √ | √ |
| Min/Max default filter values | √ |  | √ | √ |
| Disable Cached Filter Values | √ | √ | √ | √ |
| SSRS Reports |  |  | √ |  |
| Allow Freehand SQL Calculated Fields | √ |  | √ | √ |
| Javascript Charts |  |  | √ |  |
| **Report Menu** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Broadcast Reports | √ | √ | √ | √ |
| Distribute Reports | √ | √ | √ | √ |
| Email Reports | √ | √ | √ | √ |
| Hide Open Report |  |  |  |  |
| Hide Report Details (Report Menu) |  |  |  |  |
| Hide SQL | √ | √ |  |  |
| Multicast Reports | √ | √ | √ | √ |
| Multicast Access Filter Reports | √ | √ | √ | √ |
| Hide Report Refresh |  |  |  |  |
| Hide Embed Links |  |  |  |  |
| Hide External Links |  |  |  |  |
| **Storyboard** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Distribute Storyboards | √ | √ | √ | √ |
| Email Storyboards | √ | √ | √ | √ |
| Storyboards | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  □ D |
| Storyboard Admin |  |  | √ | √ |
| Public Storyboards | √ |  | √ | √ |
| Storyboard Global Filters | √ | √ | √ | √ |
| **Collaboration** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Hide Comments |  |  |  |  |
| Annotations | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D | ☑ C  ☑ R  ☑ U  ☑ D |
| Timeline | √ | √ | √ | √ |
| Connections | √ | √ | √ | √ |
| Discussion Topics | ☑ C  ☑ R  ☑ U  ☑ D | □ C  ☑ R  □ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D | ☑ C  ☑ R  ☑ U  ☑ D |
| Collaboration Admin | √ | √ | √ | √ |
| Activity Stream | √ | √ | √ | √ |
| Enable Tasks |  |  |  |  |
| Personal Tasks |  |  |  |  |
| Public Tasks |  |  |  |  |
| System Task Admin |  |  | √ |  |
| **Configuration** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Configuration |  |  | √ | √ |
| Configure Logon ID |  |  | √ |  |
| Configure Page Format |  |  | √ |  |
| Configure Support Email |  |  | √ |  |
| **Administration** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Approval Admin |  |  | √ |  |
| Import |  |  | √ | √ |
| Export |  |  | √ | √ |
| Folder Access | √ |  | √ | √ |
| System Information |  |  | √ | √ |
| Licence Management |  |  | √ |  |
| Create and Edit Tags |  |  | √ |  |
| Client Organisation Management | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | □ C  ☑ R  □ U  □ D |
| Filter Period Management |  |  | √ | √ |
| Translate content |  |  |  |  |
| Themes | ☑ C  ☑ R  ☑ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  ☑ D |
| Geometry Pack Management |  |  | √ |  |
| Background Execution Management |  |  | √ | √ |
| View and Field Categories |  |  | √ | √ |
| Org Reference Codes |  |  | √ |  |
| Plugin Management |  |  | √ |  |
| **Data Sources & Views** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Data Sources | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  □ U  ☑ D |
| OLAP |  |  | √ |  |
| Data Source Admin | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  □ U  ☑ D |
| Source Filters |  |  | √ |  |
| Database Views | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  □ U  ☑ D |
| Freehand SQL Views |  |  | √ |  |
| Show Draft Views |  |  | √ |  |
| Stored Procedures |  |  | √ |  |
| Force Clone Views |  |  | √ |  |
| Hide DBMS Messages | √ | √ |  |  |
| Create CSV Table |  |  | √ |  |
| Composite Views |  |  | √ |  |
| Data Transformations |  |  |  |  |
| Skip Schema Check |  |  |  |  |
| Report as a Datasource |  |  | √ |  |
| **User Administration** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| User Management | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  □ D |
| Group Management | □ C  □ R  □ U  □ D | □ C  □ R  □ U  □ D | ☑ C  ☑ R  ☑ U  □ D | ☑ C  ☑ R  ☑ U  □ D |
| Roles Management |  |  | √ | √ |
| Hide profile password | √ | √ | √ | √ |
| Disable profile email change | √ | √ | √ | √ |
| Hide profile User ID | √ | √ | √ | √ |
| Named User | √ | √ | √ | √ |
| Restrict Visible Roles |  |  |  |  |
| **Web Services** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Web Services |  |  | √ |  |
| Disable Mobile Access |  |  |  |  |
| **Augmented Data Discovery** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Assisted Discovery | √ |  | √ | √ |
| Instant Insight |  |  |  |  |
| Instant Insight Settings |  |  |  |  |
| **Other** | **Standard Customer User** | **Read Only User** | **System Administrator** | **Analyst** |
| Subscribe to Broadcast | √ | √ | √ | √ |