ESR Business Intelligence

Managing Permissions in ESR BI

Sharing objects to other users

A dashboard prompt is the most common and flexible prompt type. Dashboard prompts allow the end user to specify the data values that determine the content of one or all of the Setting permissions on objects in ESR BI enables you to control which users with the correct URPs are able to use the dashboards and analyses that you create. This document aims to show how permissions can be set, the common issues when using permissions and other ways of sharing objects across organisations.

Object Structure

Objects are structured into folders in ESR BI – similar to how files are stored on a computer. For example if an analysis was saved in a folder called 'HumanResources' within the 'MyFolder' folder in ESR BI, the object location would be:

'/MyFolder/HumanResources/'

If the HumanResources folder was moved into the VPD folder of the Shared Folder, the location might be:

'/Shared Folders/123/HumanResources/'

It is important that BI Administrators understand the object structure in ESR BI as the structure is used when adding objects to a dashboard and when setting permissions.

Example

For example; let's say we have developed a new analysis called 'NHS Absence Rate' which is currently saved in the below location:

'/My Folder/Absence Items/NHS Absence Rate'

We then create a dashboard called 'NHS Absence Dashboard' which is at the below location:

'/Shared Folders/123/Dashboards/NHS Absence Dashboard'

We edit the dashboard and add the analysis to it. When we run the dashboard we see the analysis as expected, however we will experience two major problems with this when we come to share the dashboard with other users.

Issues
1) The dashboard uses the location of the 'Absence Rate' analysis to display it in the dashboard. Although this will work for us, when we share the dashboard another user will not have the analysis stored in their folder (the 'My Folder' is unique to each user). Therefore we need to move the analysis into the 'shared folders' so that other users may see it.
2) Let's say that we've now moved the analysis to the below location:

'/Shared Folders/123/Absence Items/NHS Absence Rate'

When we run the dashboard we just see a blank page. Why? The dashboard is still referencing the old location. We must therefore edit the dashboard again, remove the existing analysis and replace it with the one at the new location. When we share the dashboard with other users, they will be able to see it correctly as they have access to both objects.

Permissions
By default there are a number of permissions automatically set on certain areas of BI. These include:

1. 'My Folder' – This folder is unique to each user and items within your folder can only be seen by you. You cannot change the permissions on this folder.
2. 'Shared Folders' – Inside the 'Shared Folders' folder, there are two folders:
   a. National Dashboards – This contains all the objects for national dashboards and is maintained by the NHS Central Team.
   b. VPD (e.g. 123). Each organisation has a folder with their own VPD. Items placed in this folder will be <u>automatically shared with all users</u> within the organisation.

Permissions are set using the Permissions menu item in ESR BI:
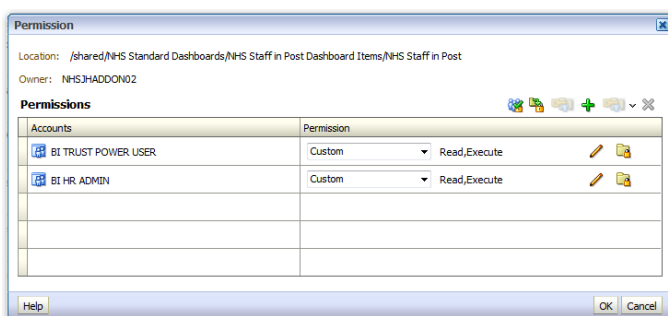
In ESR BI permissions are set using 'Application Roles'. These roughly translate to URPs in ESR – the difference between the application roles and ESR URPs is that the roles will have the 'BI' prefix.

When setting permissions on objects in ESR BI the permissions are added with an 'OR' operator. In the example, the Staff in Post analysis can be accessed by anyone with the Trust Power User **or** HR Admin application roles (this translates to BI Administration URP or HR Administration URP).

Example – Sharing an Object to a specific URP within the organisation

In this example we have created an analysis which we have copied to our VPD (180 here) shared folder:
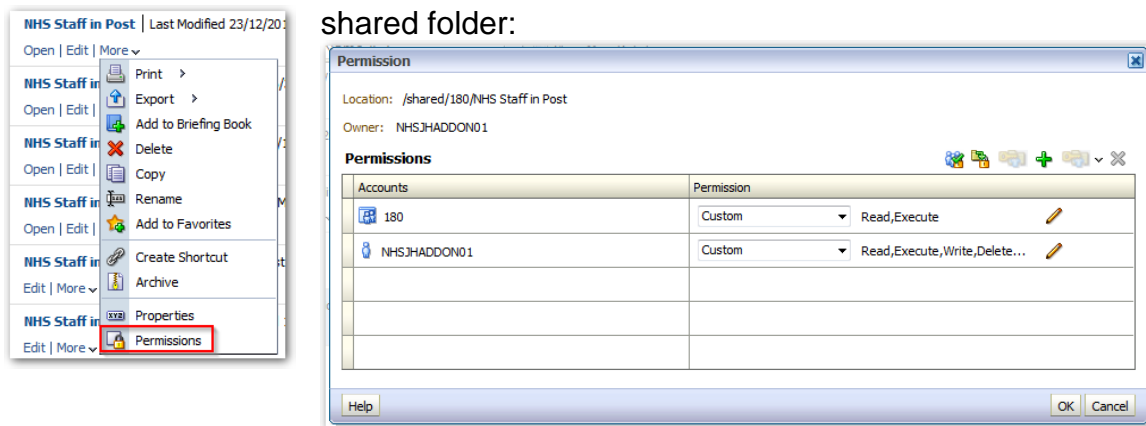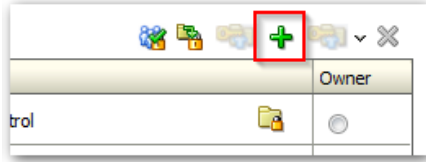

We can see the default permissions are for to Read and Execute for VPD 180. This means all users in our VPD can see the analysis. We want to restrict the analysis so that only users of the HR Administration URP can see it. To do this we need to firstly ensure that the BI TRUST POWER USER permission is granted (this gives all other BI Administrators in the organisation access including ourselves). Then we remove the VPD role and add the roles we want to restrict to. This is described step-by-step below:

Screen	Description
	On the permissions screen, click the 'Add' icon
	Search for 'BI'. Scroll down until you find the application role 'BI TRUST POWER USER' then click the 'Move' icon.

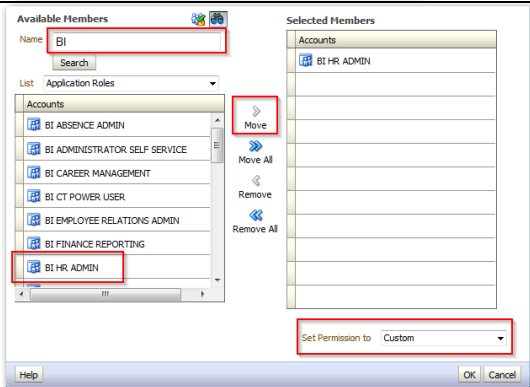Ensure the 'Set Permission to' value is 'Full Control'.
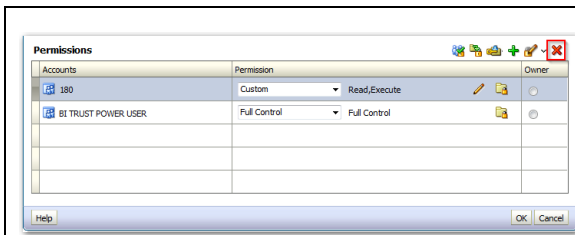
Click OK |

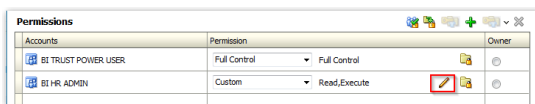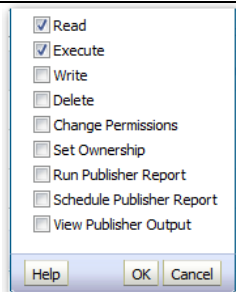|	
	You will now have application roles for the VPD and the Trust Power User. Click the VPD role then click the delete icon.
	Click the Add icon
	Search for BI. Scroll down to find the correct role (BI HR ADMIN in this example), then click 'Move'. Ensure the Set Permission to is 'Custom'
	Your permissions are displayed. Edit the permissions for the URP access
	Ensure permissions are set to 'Read' and 'Execute' only. Click OK Permissions are now set.
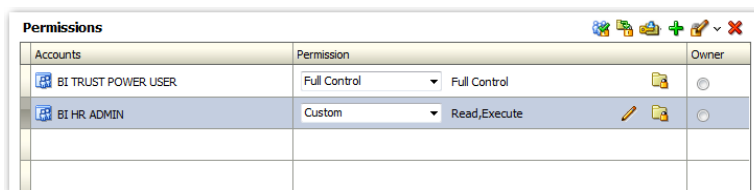
Permissions are now set as above. Only users with the BI Administration URP **OR** the HR Administration URP can access the analysis. If using the HR Administration URP, the user may only read or execute the analysis and not modify or delete it.

The important part of this process is to ensure you remove the VPD role and correctly set access for the TRUST POWER USER role. If you remove the VPD role and do not set the access for BI Administrators, you may lose access to your own object!

Important Notes:

1) If you do not remove the VPD role from the permissions screen, all users in your organisation will have access to the object.
2) By default new objects in a folder will automatically inherit the permissions of that folder.
3) Only apply or change permissions to application roles that are in capital letters. Do not use or change permissions not in capitals as these are used for central administration.
4) When sharing a dashboard with application roles, you must ensure that the objects within the dashboard have appropriate permissions to enable the user to view/execute them. It is not enough to change the permissions on the dashboard only.
5) It is not possible to share a report publicly – archiving functionality can be used to share objects across different organisations (covered later in this document).

If you accidentally set incorrect permissions and lose access to your own object, please raise an SR stating the steps you took and the name and location of the object.

Sharing Objects to Other Organisations / Sharing objects to users in another VPD

Previously Discoverer reports could be shared to other organisations by making the report workbook 'Public'. This enabled other organisations to view your report and run it on their own data. Users could also make a copy of your public report and save a customised version.
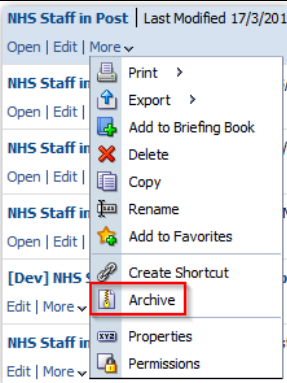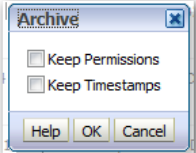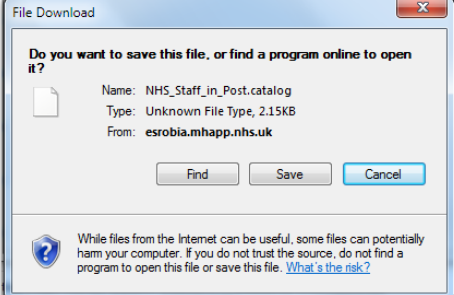
In ESR BI there is no public user, however objects can be shared to other users in other VPDs by using the 'Archive' functionality.

Archiving enables you to export an object or objects to a file format that is downloaded from ESR BI. This file can then be shared (e.g. by e-mail) and imported back in to ESR BI. For our requirement above we could send our report to another user in another VPD, have them import it back into ESR BI and run the report on their data.
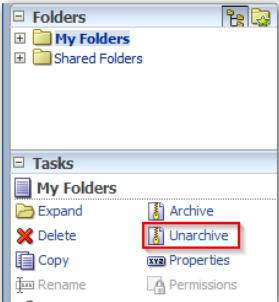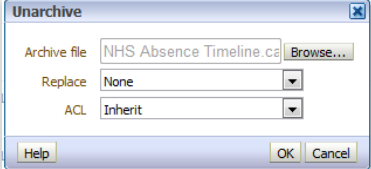
Archiving an Object

Archiving can be applied to an object or folder. We will archive an object in this example.

	Click the 'More' link on the object you wish to share. Click the Archive button.
	Click OK
	You will now see the usual file download dialog box. Save the file in a memorable location.

Importing a file back into ESR BI

The process of importing a file back into ESR BI is known as 'Unarchiving'. This functionality can only be used to import files that were originally created by ESR BI.

	Click the folder you wish to import the file into. Click the 'Unarchive' button.
	Click the browse button to find the file to import, then click OK.
	Your file has been imported.

Important notes:
1) When archiving a dashboard, you will need to ensure that you also archive the objects referenced by the dashboard.
2) When another user imports a dashboard back into ESR BI, if other objects (such as analyses) are also imported, the user may need to re-link the objects into the

dashboard as the dashboard will still reference their previous location (see object structure at the start of this document).