ALIBABA CLOUD

Alibaba Cloud

Quick BI

Configuration management

Document Version: 20210413

Alibaba Cloud

Legal disclaimer

Document conventions

Style	Description	Example
Danger	A danger notice indicates a situation that will cause major system changes, faults, physical injuries, and other adverse results.	Danger: Resetting will result in the loss of user configuration data.
Warning	A warning notice indicates a situation that may cause major system changes, faults, physical injuries, and other adverse results.	Warning: Restarting will cause business interruption. About 10 minutes are required to restart an instance.
Notice	A caution notice indicates warning information, supplementary instructions, and other content that the user must understand.	Notice: If the weight is set to 0, the server no longer receives new requests.
Note	A note indicates supplemental instructions, best practices, tips, and other content.	Note: You can use Ctrl + A to select all files.
>	Closing angle brackets are used to indicate a multi-level menu cascade.	Click **Settings> Network> Set network type**.
Bold	Bold formatting is used for buttons , menus, page names, and other UI elements.	Click **OK**.
`Courier font`	Courier font is used for commands	Run the `cd /d C:/window` command to enter the Windows system folder.
Italic	Italic formatting is used for parameters and variables.	`bae log list --instanceid` *Instance_ID*
[] or [a|b]	This format is used for an optional value, where only one item can be selected.	`ipconfig [-all|-t]`
{} or {a|b}	This format is used for a required value, where only one item can be selected.	`switch {active|stand}`

Table of Contents

1.Privilege control

1.1. Concepts

In Quick BI Basic, a user's workspace is called personal space. In Quick BI Pro and Enterprise Standard, a user's workspace is divided into personal space and group space.

What is a group space?

A group space is a workspace where organization unit members collaborate on development. In a group space, group members can collaborate to create and modify data sources, cubes, worksheets, dashboards, and data portals based on their roles. These data objects exist in the group space they belong to. Different group spaces have different data objects.

In group space management, the organizational unit administrator adds members in the organizational unit to different group spaces based on their work scope and responsibilities.

Group spaces can correspond to actual business departments of the organizational unit. For example, administrators can create workspaces for the sales department and the HR department of the organization and then add the employees as members to the corresponding workspaces.

Workspaces are similar to DingTalk groups. For example, employees can share information and communicate with each other through the DingTalk group that is corresponding to the department that they belong to.

Manage workspaces

A group space is managed by the group space administrator. Members of a workspace are appointed to be administrators by the administrator of the organization that creates the workspace. Administrators of a workspace have permission to set other members in the workspace to be administrators.

Workspace management includes:

- Creating a workspace
- Modifying a workspace
- Setting a default workspace

Differences between a personal space and a group space

Main differences between a personal space and a group space are as follows:

- A personal workspace is created automatically after the first logon. A workspace is created manually by an administrator of the organization.
- The personal space cannot be deleted, and a new personal space cannot be created.
- You are not allowed to add other members to a personal workspace. Therefore, a personal workspace does not support collaboration or transfer.
- Workspaces can be transferred to users in a group space, and can be shared with users in an organization. Personal spaces can be shared with Alibaba Cloud users.

1.2. Organization management

1.2.1. Manage the organization

1.2.1.1. Basic concepts about organization management

Organization management is a feature provided by Quick BI Pro and Quick BI Enterprise Standard that allows you to develop data collaboratively with other members in the organization. Quick BI Pro and Quick BI Enterprise Standard are officially released. Users can upgrade Quick BI Basic to a higher Quick BI version in the Quick BI console. The system automatically creates an organization for you after the upgrade.

What is an organization?

Generally, organizations refer to small and medium-sized enterprises (SMEs), public institutions, schools, or departments of large companies.

If your organization values data security highly and data analysis needs to be performed collaboratively by more than 10 members, we recommend that you purchase Quick BI Pro. Quick BI Pro brings the following benefits:

- Members have different access permissions to reports based on the departments that they belong to.
- Members have different access permissions to a report based on their roles.

We recommend that you use Quick BI Basic if the number of users is fewer than 10.

Organization member management refers to adding Alibaba Cloud users that need to work collaboratively into the same organization.

Organization management includes:

- Managing organizational information
- Managing member information
- Managing workspaces

Only administrators of an organization have permissions to manage the members of the organization. The creator of an organization is set as an administrator by default.

The roles of members in an organization include administrator and user.

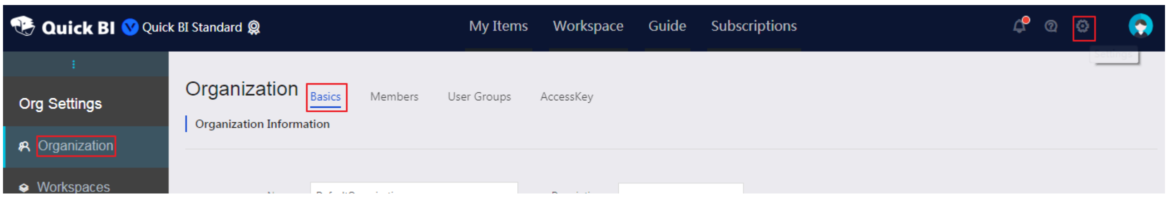
1.2.1.2. Modify the information of an organization

Administrators of an organization can modify the information of an organization.

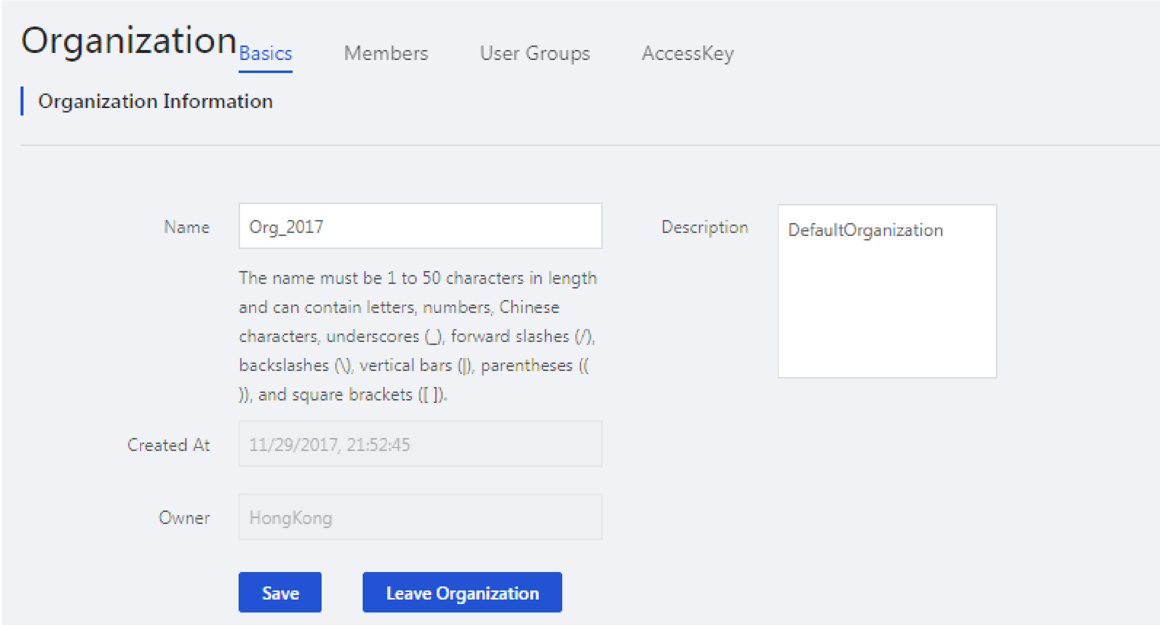
Context

Procedure

1. Log on to the Quick BI console.
2. Select **Settings > Organization > Basics**.



3. Modify the information of the organization manually as shown in the following figure.



4. Click **Save** to complete the modifying of the information of the organization.

1.2.1.3. Add Alibaba Cloud accounts to an organization

This topic describes how to add Alibaba Cloud accounts as members to an organization. You can add a single Alibaba Cloud account to an organization or import multiple accounts at a time.

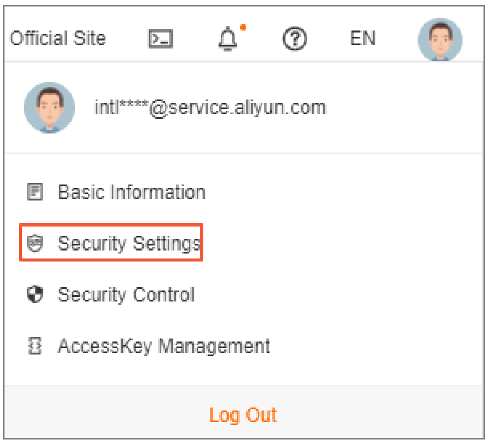
Prerequisites

You have logged on to the Alibaba Cloud Management Console.

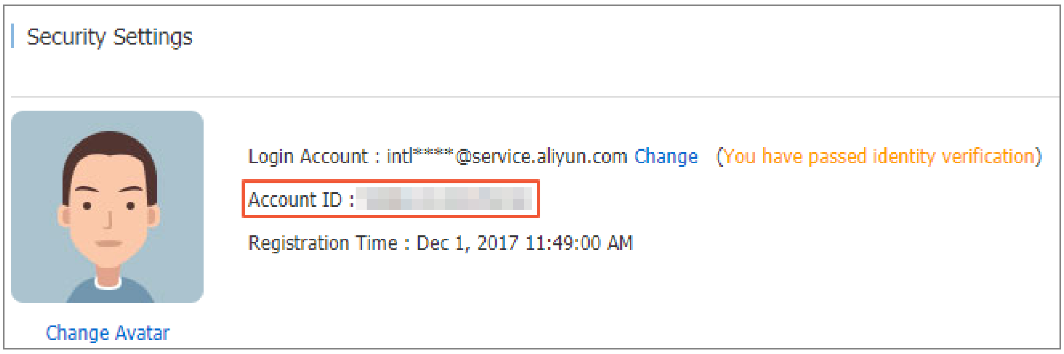
Obtain your Alibaba Cloud account

To obtain your Alibaba Cloud account, follow these steps:

1. Log on to the Alibaba Cloud Management Console.
2. Move the pointer over the profile picture in the upper-right corner of the console, and click **Security Settings**.



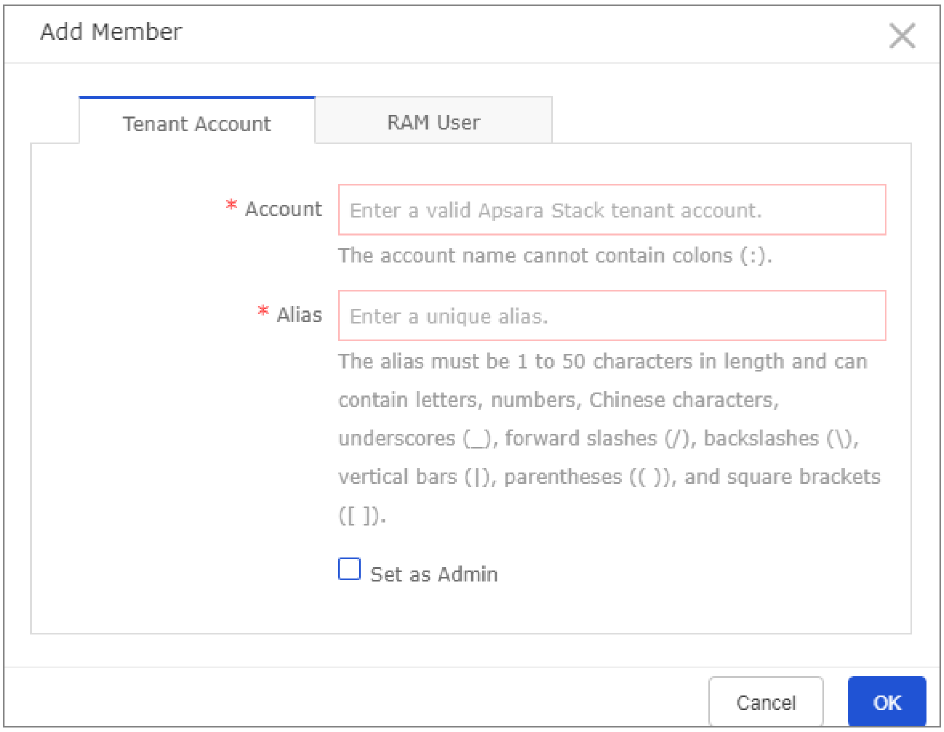
3. On the **Security Settings** page, **Account ID** is your Alibaba Cloud account.



Add an Alibaba Cloud account to an organization

To add an Alibaba Cloud account to an organization, follow these steps:

1. Log on to the Quick BI console.
2. In the top navigation bar, click the icon.
3. On the **Organization** page, click the **Members** tab.
4. Click **Add Member**.
5. In the **Add Member** dialog box, click the **Tenant Account** tab and configure the parameters listed in the following table.



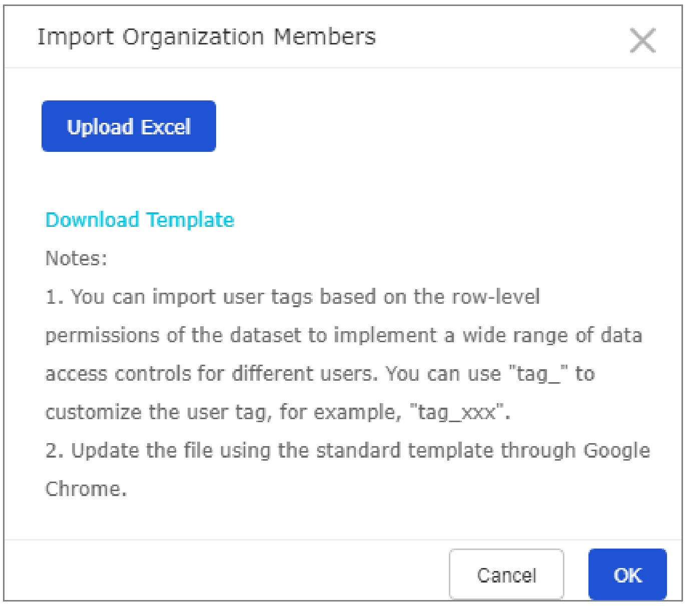
6. Click **OK**.

Add multiple accounts to an organization at a time

To import multiple accounts at a time, follow these steps:

1. On the **Organization** page, click the **Members** tab.
2. Click **Import Members**.

3. In the Import Organization Members dialog box, click **Upload Excel** and select the local file that contains the accounts.



4. Click **OK**.

1.2.1.4. Add a RAM user to an organization

This topic describes how to add a RAM user to an organization.

Background information

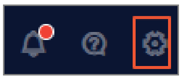
Notice This feature is available only in Quick BI Pro and Quick BI Enterprise Standard. For information about how to add organization members in Quick BI Basic, see Prerequisites.

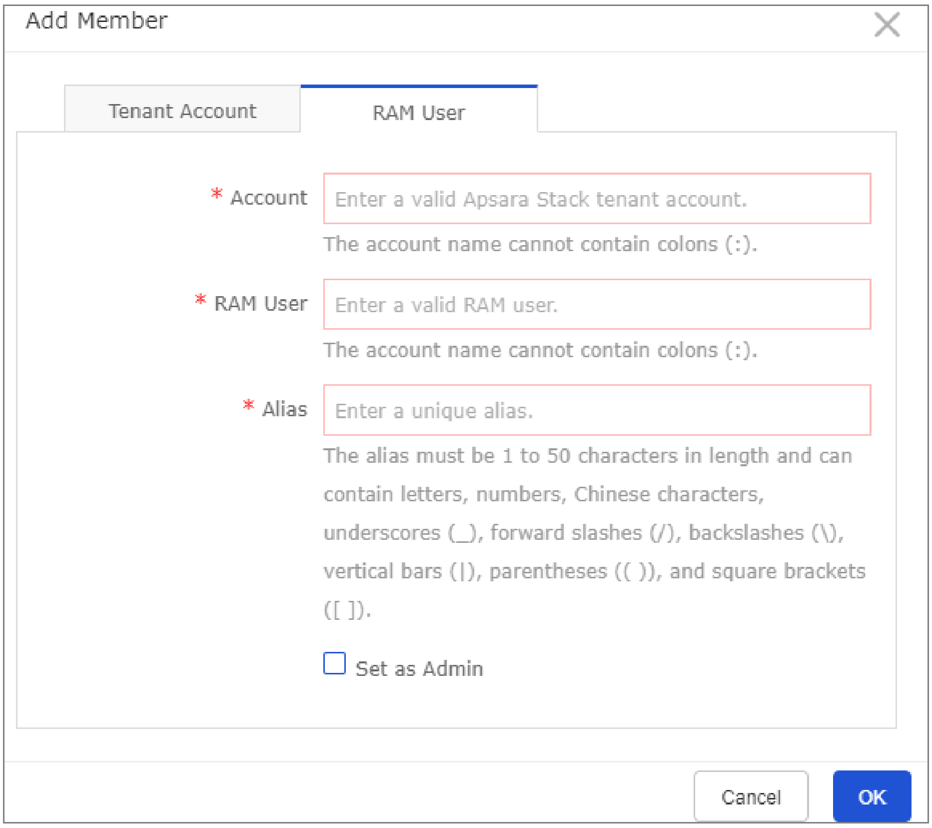
You can use the import members feature to add multiple members to an organization.

Prerequisites

You have logged on to the Quick BI console.

Procedure

1. Obtain information about a RAM user.
2. Click  in the upper-right corner of the Quick BI console.
3. Choose **Organization > Members** and click **Add Member**.
4. In the **Add Member** dialog box that appears, click the **RAM User** tab.
5. Specify **Account**, **RAM User**, and **Alias**, and select the **Set as Admin** check box as required.

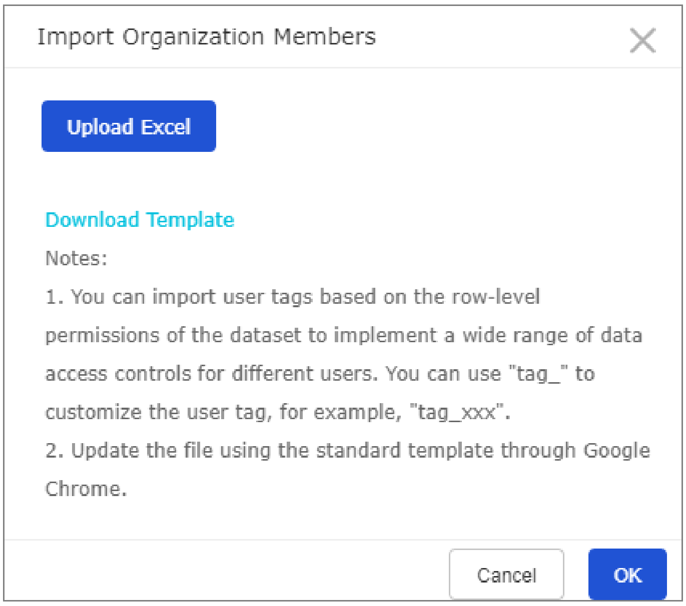


Note Make sure that you enter an Alibaba Cloud account ID for **Account**. For **RAM User**, enter the RAM username in *RAM username@Default domain or enterprise alias.onaliyun.com*. For example, if your RAM user is *zhangsan@.test.onaliyun.com*, enter *zhangsan*.

6. Click **OK** to add the member.

Import members

1. Choose **Organization > Members** and click **Import Members**.
2. In the Import Organization Members dialog box that appears, click **Upload Excel** and select the local file that contains the member list.



3. Click **OK** to import the members.

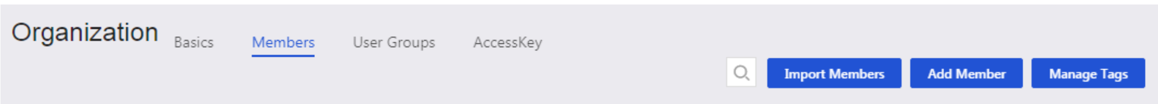
1.2.1.5. Add, search, edit, and remove members

You can add a member to an organization by adding an Alibaba Cloud account or RAM user. You can use the import members function to add multiple members to an organization. You can also search for or remove members.

Add a member

Add an Alibaba Cloud account

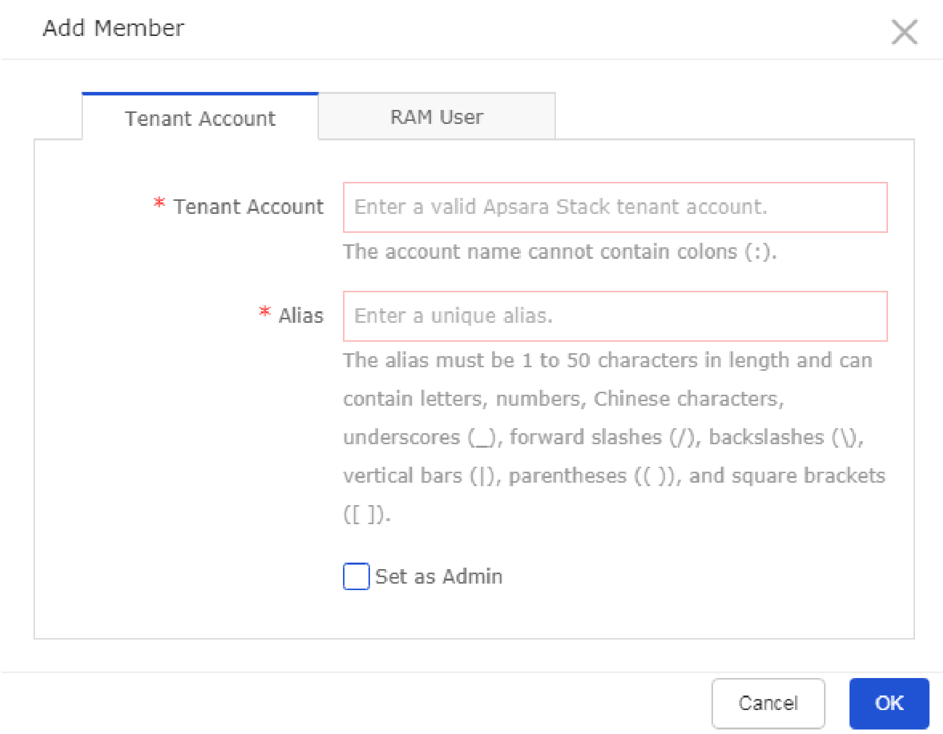
1. Log on to the Quick BI console.
2. Choose **Settings > Organization > Members**.
3. Click **Add Member** as shown in the following figure:



4. On the **Add Member** page, click the **Tenant Account** tab.

> **Note** Make sure that you enter an account ID. An account ID is a numeric string.

5. Enter the Alibaba Cloud account and an alias for the member. You can select **Set As Admin** to specify the member as an administrator, as shown in the following figure:

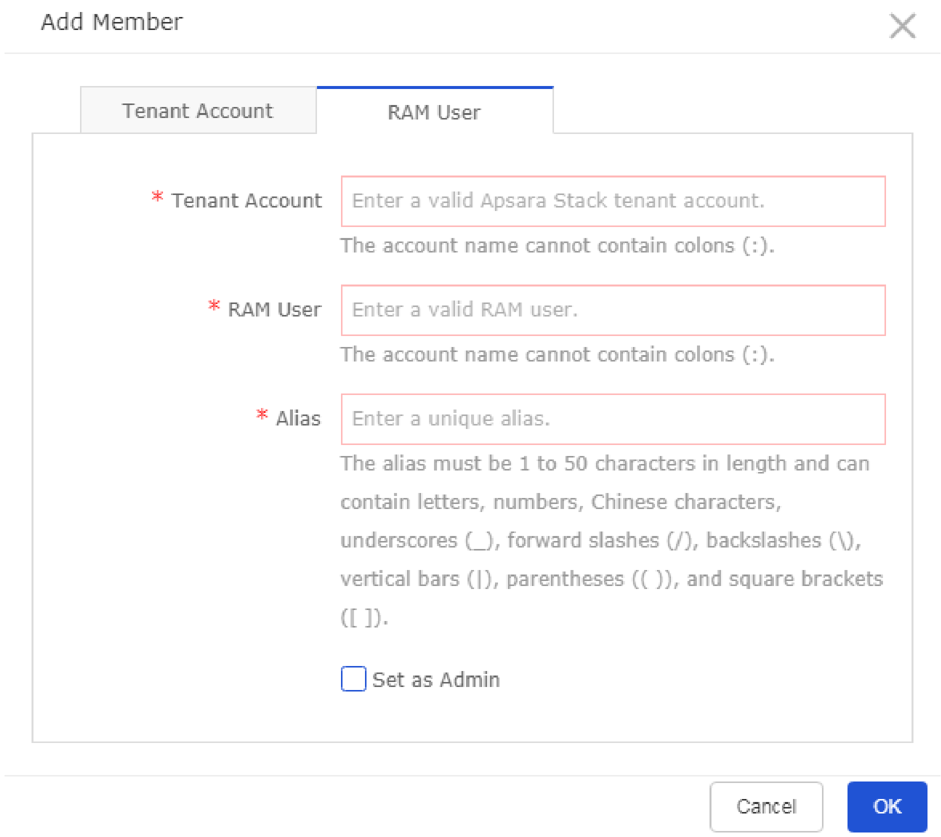


6. Click **OK** to add the member.

Add a RAM user

1. Log on to the Quick BI console.
2. Choose **Settings** > **Organization** > **Members** > **Add Member**.
3. Click the **RAM User** tab.
4. Enter the Alibaba Cloud account, the RAM user, and an alias. You can select **Set As Admin** to specify the member as an administrator, as shown in the following figure:

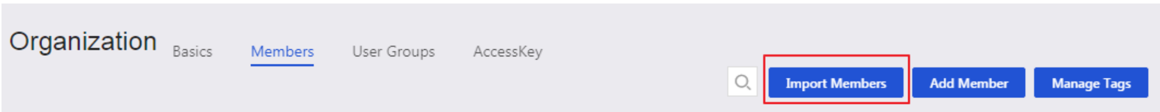
> **Note** Make sure that you enter an account ID. An account ID is a numeric string. For RAM users, enter the RAM username in "RAM username@Default domain or enterprise alias.onaliyun.com". For example, if your RAM user account is zhangsan@.test.onaliyun.com, enter zhangsan.



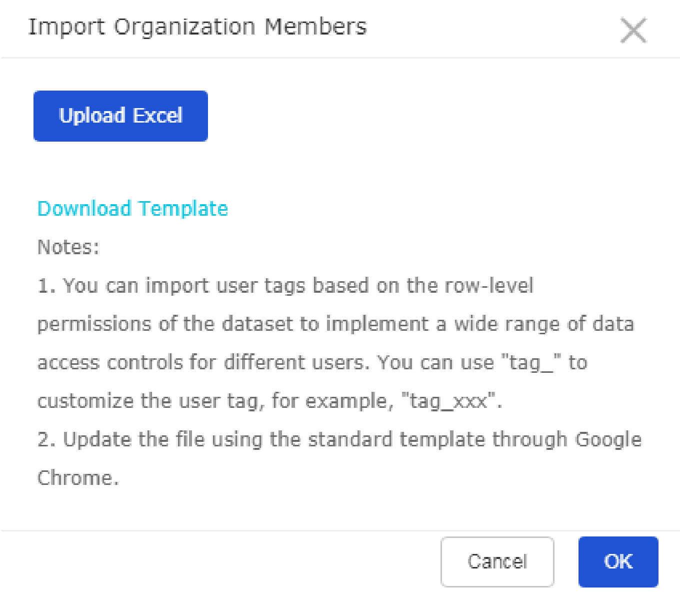
5. Click **OK** to add the member.

Import members

1. Log on to the Quick BI console.
2. Choose **Settings** > **Organization** > **Members**.
3. Click **Import Members**, as shown in the following figure:



4. Click **Upload Excel** to upload a list of members from the local disk, as shown in the following figure:

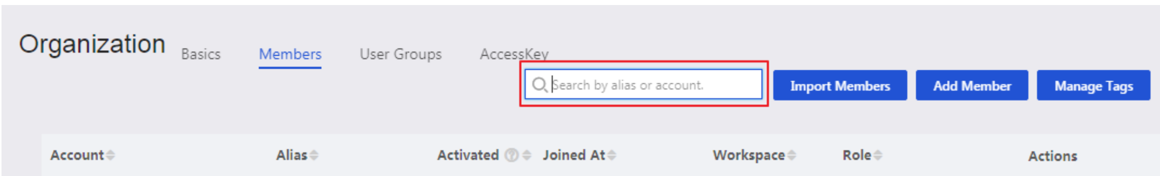


5. Click **OK** to import the members.

Search members

You can search for members by alias or Alibaba Cloud account.

1. Log on to the Quick BI console.
2. Choose **Settings** > **Organization** > **Members**.
3. Enter an alias or Alibaba Cloud account into the search bar, as shown in the following figure:

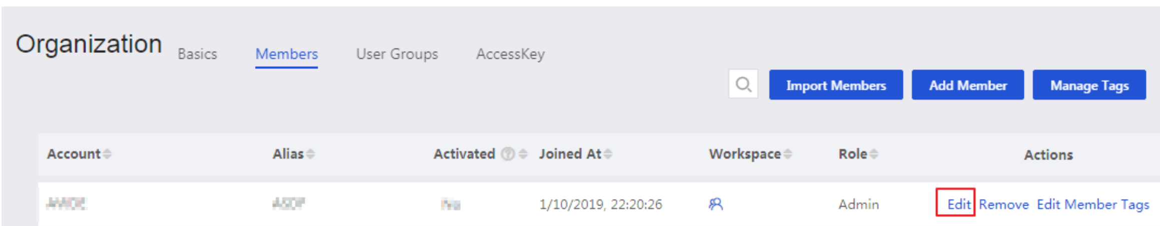


4. Click the **Search** icon to search for the member.

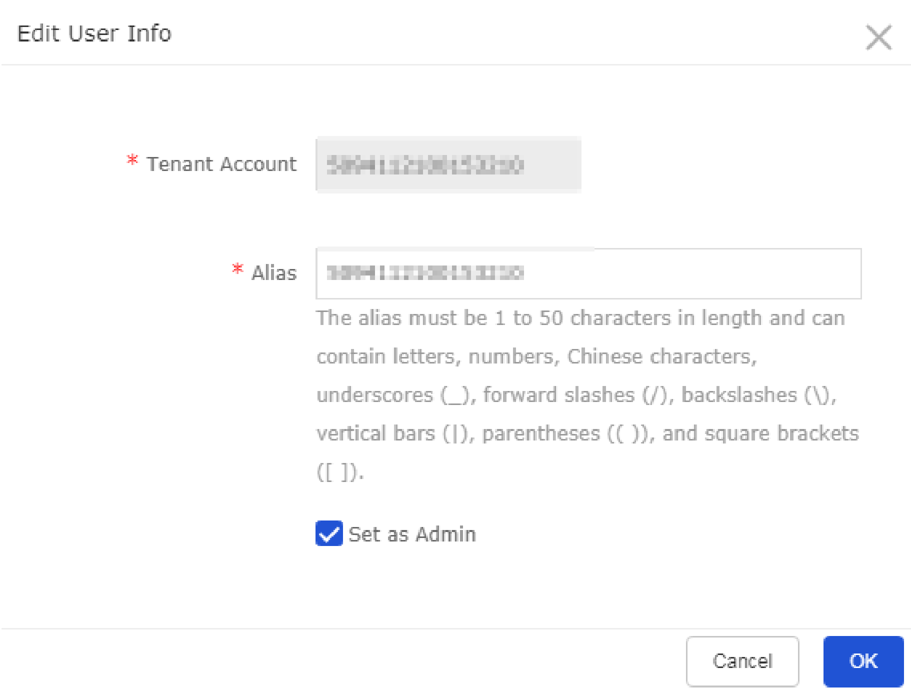
Edit a member

Administrators can edit the information of members.

1. Log on to the Quick BI console.
2. Choose **Settings** > **Organization** > **Members**.
3. Select a member, and click **Edit** in the Actions column.



4. You can edit the alias of the member, and choose whether to specify the member as an administrator by setting the **Set as Admin** option.

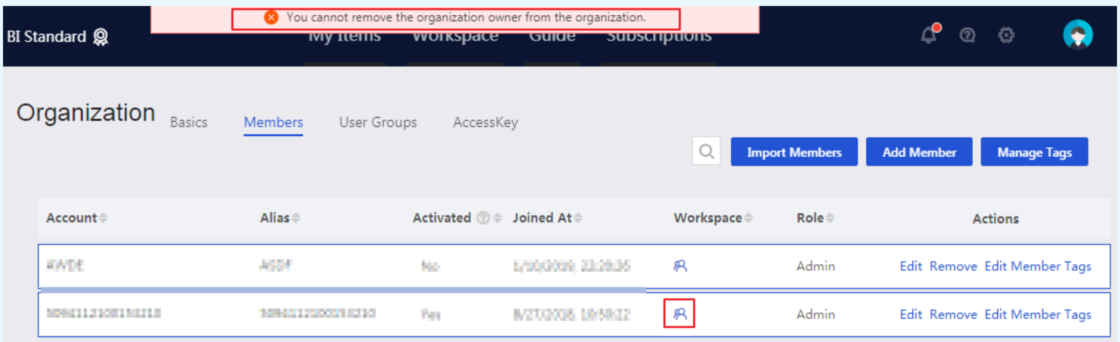


5. Click **OK** to submit the changes.

Remove a member

Administrators can remove members. The remove operation is irreversible. Use with caution. To rejoin an organization, you must contact an administrator to add you to the organization as a member.

1. Log on to the Quick BI console.
2. Choose **Settings > Organization > Members**.
3. Select a member, and click **Remove** in the Actions column.

> **Note** If the member is in a workspace, the system prompts the following error message:
>
> 
>
>
> You cannot remove a user who is a member of a group workspace. For more information about removing a member from a workspace, see Delete a member.

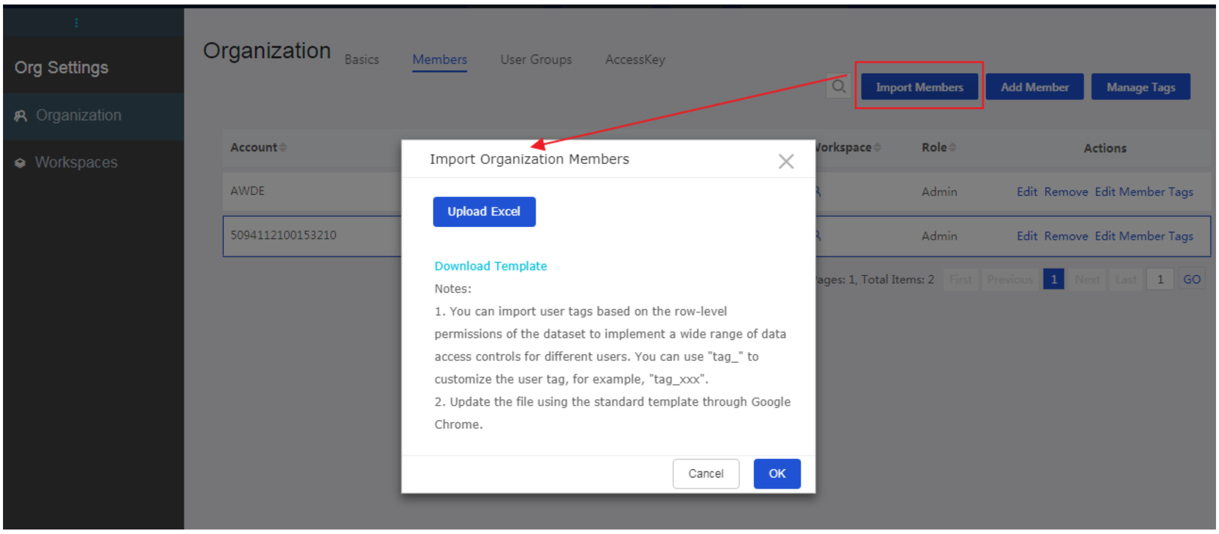
4. Click **OK** to remove the member.

1.2.1.6. Tags

Member tags are used to set dataset row-level permissions. This topic describes how to manage member tags. For more information about the row-level permission setting, see Configure row-level permissions.

Add a tag

You can use the import members function to add tags, as shown in the following figure:



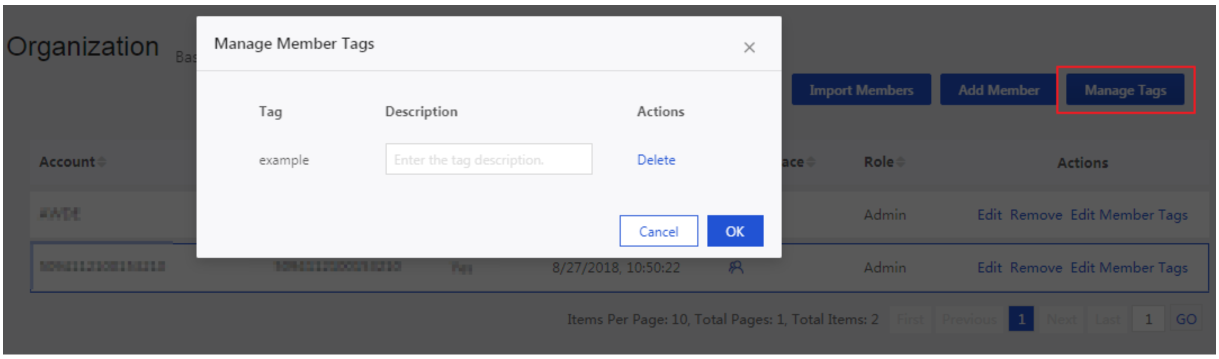
Click **Download Template** to download the member template. In this example, the member information is as follows:

Account	Nickname	tag_tagArea	tag_tagProvince
example1@aliyun.com	example1	East	Anhui
example2@aliyun.com	example2	East	Anhui

Note For members that do not need the row-level permission setting, set their tags to $ALL_MEMBERS$.

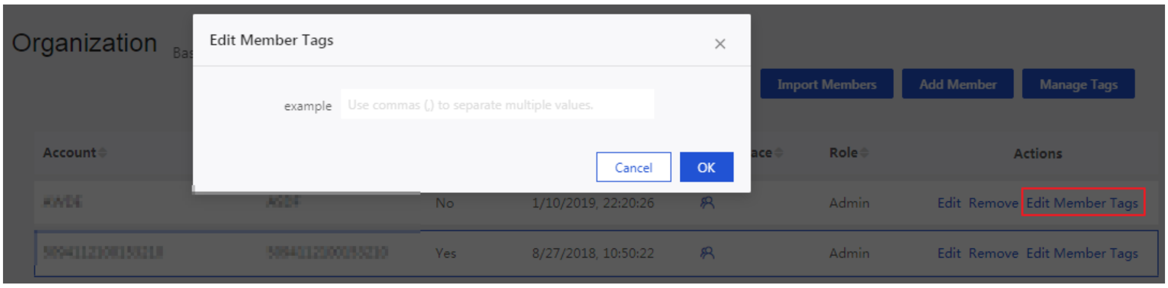
Manage tags

You can manage tags as shown in the following figure:



Edit a tag

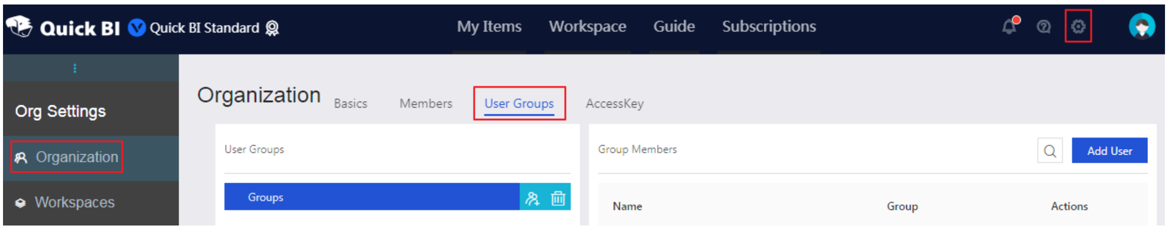
1. Select a member that you need to set the row-level permission for, and click Edit Member Tags.
2. On the edit member tags page, enter the tag values, and then click OK, as shown in the following figure:



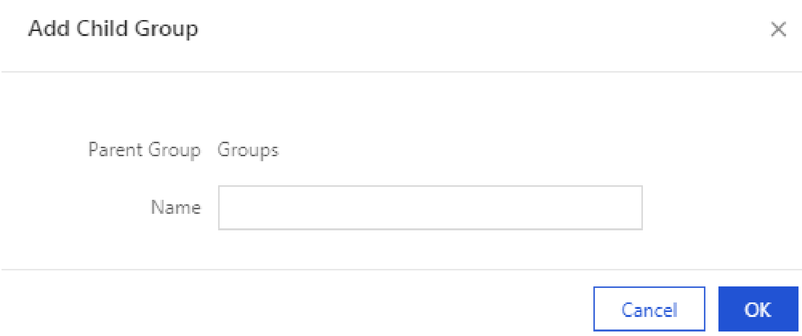
1.2.1.7. Create a user group

Members in an organization may belong to different departments, such as the sales, operations, and technology departments. They may also have different roles, such as analysts, project managers, and project directors. You can create multiple user groups for these members. A member can be added to multiple user groups. You can then grant these user groups the access permission to datasets and BI portals as needed.

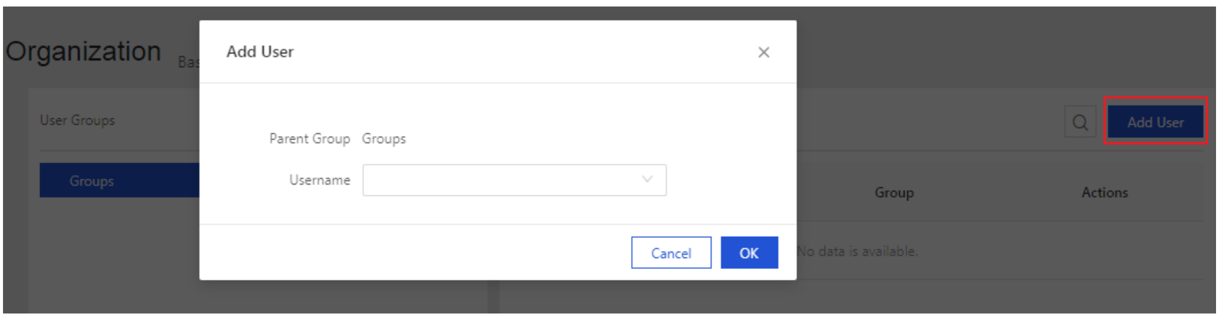
1. Log on to the Quick BI console.
2. Choose **Settings** > **Organization** > **User Groups**.
3. On the user groups page, click the **Add Child Group** icon.



4. On the child group page, enter a group name and then click **OK**.



After creating the child group, you can click **Add User** to add users to this group.



1.2.2. Manage workspaces

1.2.2.1. Workspace member overview

You need to assign a role to the member after you add it to a workspace . Roles have different permissions. Each member can be assigned a maximum of one role.

Roles include Space Manager, Developer, Analyst, and Viewer.

Mappings for roles and permissions

Mappings for roles and permissions are fixed and not modifiable. To grant permission to the member of a workspace, you only need to specify the role for the member.

> **Note** The classic workbook feature is in beta and will not be supported in future versions. A classic workbook does not support custom grouping fields, data type conversions, dataset joins based on snowflake schemas, and joins for databases from different data sources.

Function navigation entry

Permission	Developer	Analyst	Viewer
Datasets/Data sources	Supported	Not supported	Yes
Classic Workbooks/Workbooks	Supported	Supported	Supported
Dashboards	Supported	Supported	Supported
BI Portals	Supported	Supported	Supported

Datasets/Data sources

Permission	Developer	Analyst	Viewer
Create data sources	Supported	Not supported	Not supported
Modify data sources	Only modifying own data sources is supported	Not supported	Not supported
Delete data sources	Only deleting own data sources is supported	Not supported	Not supported
Use data sources	Supported	Not supported	Not supported
Create datasets	Supported	Not supported	Not supported
Modify datasets	Only modifying own datasets is supported	Not supported	Not supported

Permission	Developer	Analyst	Viewer
Delete Datasets	Only deleting own datasets is supported	Not supported	Not supported
Use datasets	Supported	Supported	Not supported

Classic workbooks

Permission	Developer	Analyst	Viewer
Create classic workbooks	Supported	Supported	Not supported
Modify classic workbooks	Only modifying own classic workbooks is supported	Only modifying own classic workbooks is supported	Not supported
Delete classic workbooks	Only deleting own classic workbooks is supported	Only deleting own classic workbooks is supported	Not supported
View classic workbooks	Supported	Supported	Supported
Share classic workbooks	Only sharing own classic workbooks is supported	Only sharing own classic workbooks is supported	Not supported
Reference classic workbooks	Supported	Supported	Not supported

Workbooks

Permission	Developer	Analyst	Viewer
Create workbooks	Supported	Supported	Not supported
Modify workbooks	Only modifying own workbooks is supported	Only modifying own workbooks is supported	Not supported
Delete workbooks	Only deleting own workbooks is supported	Only deleting own workbooks is supported	Not supported
View workbooks	Supported	Supported	Supported
Share workbooks	Only sharing own workbooks is supported	Only sharing own workbooks is supported	Not supported
Reference workbooks	Supported	Supported	Not supported

Dashboards

Permission	Developer	Analyst	Viewer
Create dashboards	Supported	Supported	Not supported
Modify dashboards	Only modifying own dashboards is supported	Only modifying own dashboards is supported	Not supported
Delete dashboards	Only deleting own dashboards is supported	Only deleting own dashboards is supported	Not supported
View dashboards	Supported	Supported	Supported
Share dashboards	Only sharing own dashboards is supported	Only sharing own dashboards is supported	Not supported
Reference dashboards	Supported	Supported	Not supported
Publish dashboards	Only publishing own dashboards is supported	Only publishing own dashboards is supported	Not supported

BI portals

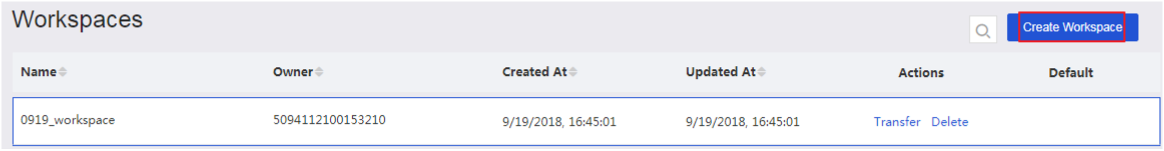
Permission	Developer	Analyst	Viewer
Create BI portals	Supported	Supported	Not supported
Modify BI portals	Only modifying own BI portals is supported	Only modifying own BI portals is supported	Not supported
Delete BI portals	Only deleting own BI portals is supported	Only deleting own BI portals is supported	Not supported
View BI portals	Supported	Supported	Supported
Share BI portals	Only sharing own BI portals is supported	Only sharing own BI portals is supported	Not supported

1.2.2.2. Create a workspace

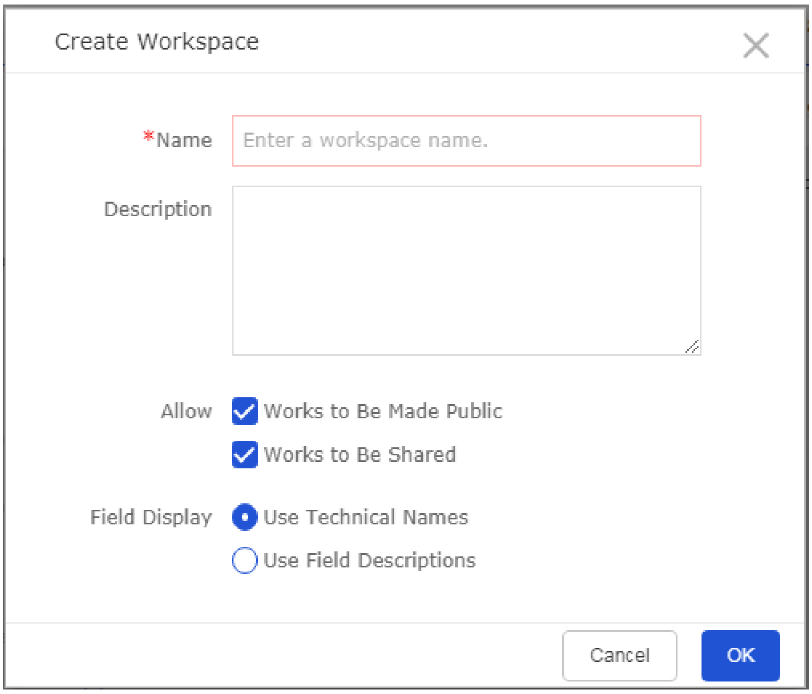
You can perform the following steps to create a workspace.

Procedure

1. Log on to the Quick BI console.
2. Choose **Settings > Workspaces**.
3. Click **Create Workspace** as shown in the following figure.



4. In the **Name** field, enter a name for the workspace as shown in the following figure.



5. Click **OK** to complete the creating of the workspace.

1.2.2.3. View the workspaces that a member belongs to

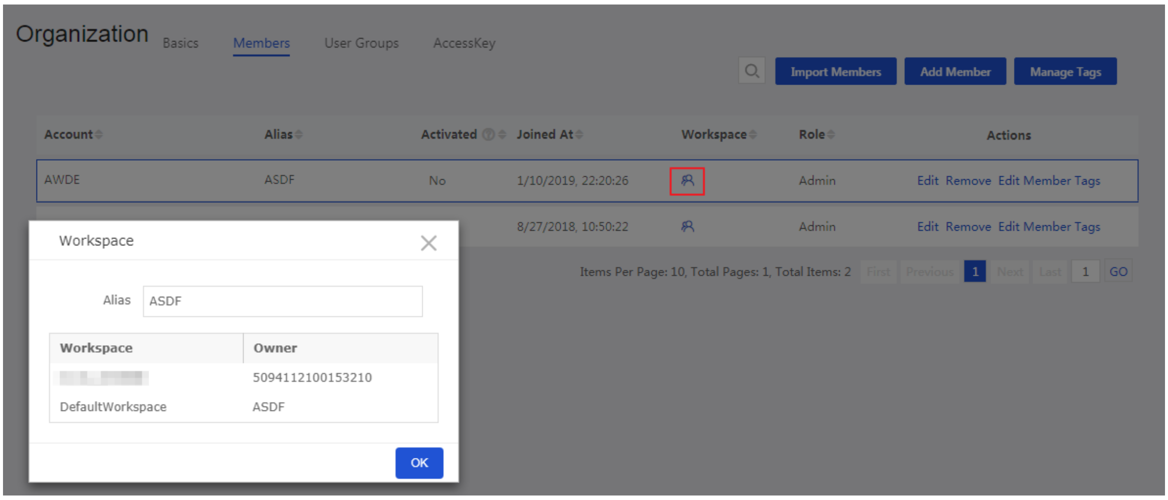
You can view the workspaces that a member belongs to by clicking the corresponding Workspace icon.

Context

A blue icon indicates that the member belongs to at least one workspace. A grey icon indicates that the member does not belong to any workspaces.

Procedure

1. Log on to the Quick BI console.
2. Choose **Settings** > **Org Units** > **Members**.
3. Select a member and click the Workspace icon (blue) in the Workspace column.
4. View the workspaces that the member belongs to as shown in the following figure.



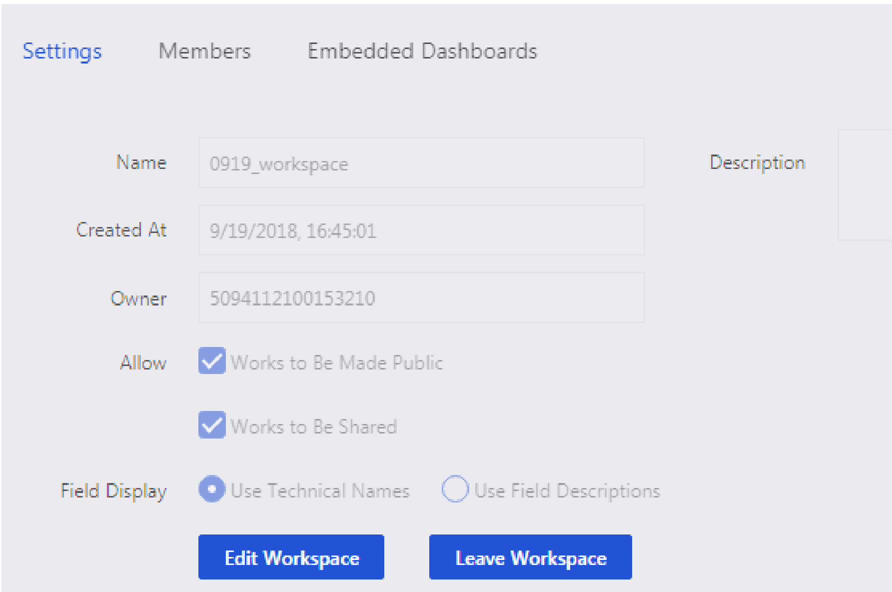
5. Click **OK** to close the dialog box.

1.2.2.4. Modify the information of a workspace

Only the owner of a personal workspace is allowed to modify the information of the personal workspace. Oppositely, only the administrators of a workspace are allowed to modify the information of the workspace.

Procedure

1. Log on to the Quick BI console.
2. Choose **Settings** > **Workspaces**.
3. Click the **Settings** tab to jump to the **Settings** tab page.
4. Click **Edit Workspace** as shown in the following figure.



5. Click **OK** to finish the modification.

1.2.2.5. Add, edit, search, and delete workspace members

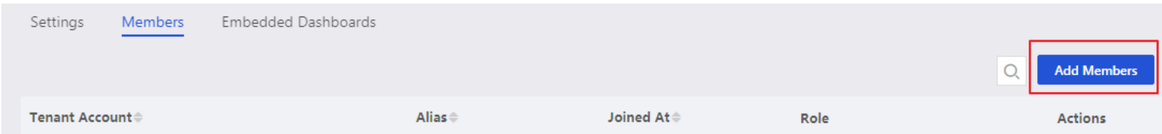
On the workspaces page, you can add, edit, search, and delete workspace members. To perform these actions, you must first go to the workspaces page.

Go to the workspaces page

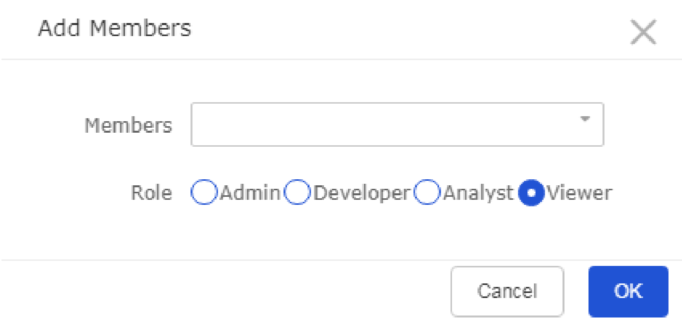
1. Log on to the Quick BI console.
2. Click **Settings > Workspaces** in the upper-right corner of the page.
3. Click the **Members** tab to show the Members tab page.

Add members to a workspace

1. On the workspaces page, click the workspace that you want to add members to.
2. Click the **Members** tab, and then click **Add Members** on the members tab page, as shown in the following figure:



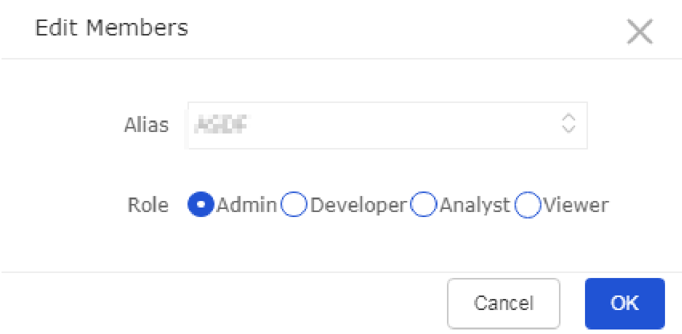
3. Search members by alias and select a role for the members, as shown in the following figure:



4. Click **OK** to add the members.

Modify the member role

1. On the workspaces page, click the workspace that the member belongs to.
2. Click the **Members** tab, and click **Edit** in the Actions column for the target member.
3. Change the role of the member.

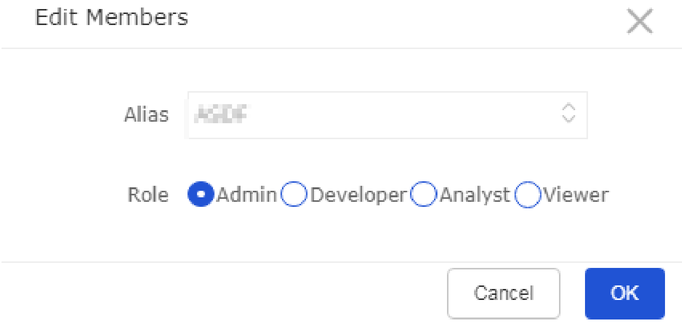


Different roles are granted different permissions. For more information, see Workspace member overview.

4. Click **OK** to submit the change.

Search members

1. On the workspaces page, click a workspace to search members.
2. Click the **Members** tab, enter an alias into the search box on the members tab page.



3. Click the **Search** icon to search for the member.

Delete a member

1. On the workspaces page, click the workspace that the target member belongs to.
2. Click the **Members** tab, and click **Delete** in the Actions column for the target member.
3. Select a new owner from the drop-down list. Items under the member to be deleted will be transferred to the new owner.
4. Click **OK** to delete the member.

1.3. Basic concepts of permission management

Permission management include data object management and row-level permission management.

Data objects include data sources, datasets, workbooks, dashboards, and portals. Data object management is classified based on the workspace types, which include the personal workspace and the workspace.

Row-level permission

You do not need to configure row-level permission for all fields in a dataset. Configure row-level permission for certain fields as needed.

Currently, for a single field, the maximum number of values that can be shown on the list is 500. If the number of values exceeds 500, you can add the excess values to the list manually.

You can find the **All** check box on the list. If you select the All check box (equivalent to selecting all values of a field) for a member of the organization, then the member can access the dataset without restriction from this field. You do not need to reselect the All check box after adding or deleting values for this field.

Significant time for configuring permissions is saved for administrators through selecting the All check box.

Manage data objects in a workspace

Quick BI supports sharing and publishing data objects in a workspace.

Share data objects in a workspace

Quick BI supports sharing workbooks, dashboards, and portals. Shared data objects are read-only for other Alibaba Cloud accounts and RAM users. Other Alibaba Cloud accounts and RAM users do not have permission to modify, delete or save the data objects.

- Only the owner of the data object and the administrators of the workspaces have permissions to share the data object.
- If you clear the Works can be authorized checkbox for a workspace, then the data objects in this workspace cannot be shared.
- Currently, data objects can only be shared with Alibaba Cloud accounts and RAM users of the same organization.

Members can access the data objects in the workspace that they belong to.

Data objects can be shared with members of the same organization. Authorized users can view the shared data objects in their own **personal workspaces**.

Publish data objects in a workspace

Data objects that have been published can be accessed by everyone using the URLs. We recommend that you do not publish data objects that involve private business data.

Manage data objects in the personal workspace

Only the owner of a personal workspace has permission to perform operations on the data objects.

Share data objects in the personal workspace

Quick BI supports sharing workbooks, dashboards, and portals. Shared data objects are read-only for other Alibaba Cloud accounts and RAM users. Other Alibaba Cloud accounts and RAM users do not have permissions to modify, delete or save the data objects.

- Only the owner of the data objects has permission to share them.
- Data objects can only be shared with users of Alibaba Cloud Quick BI.

Authorized users can view the shared data objects in their own personal workspaces.

Publish data objects in the personal workspace

Data objects that have been published can be accessed by everyone using the URLs. We recommend that you do not publish data objects that involve private business data.

2.Email subscriptions

The email subscription function of Quick BI allows you to use emails to send pictures of dashboards or workbooks to users periodically. This function is only available in Quick BI Pro and Quick BI Enterprise Standard.

2.1. Create an email subscription task

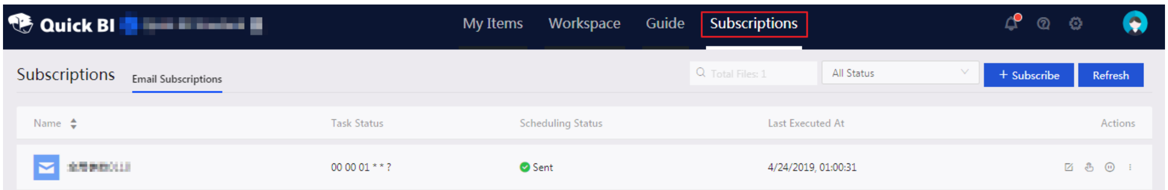
This topic describes how to create an email subscription task to send subscribed data to specific recipients by using emails.

Context

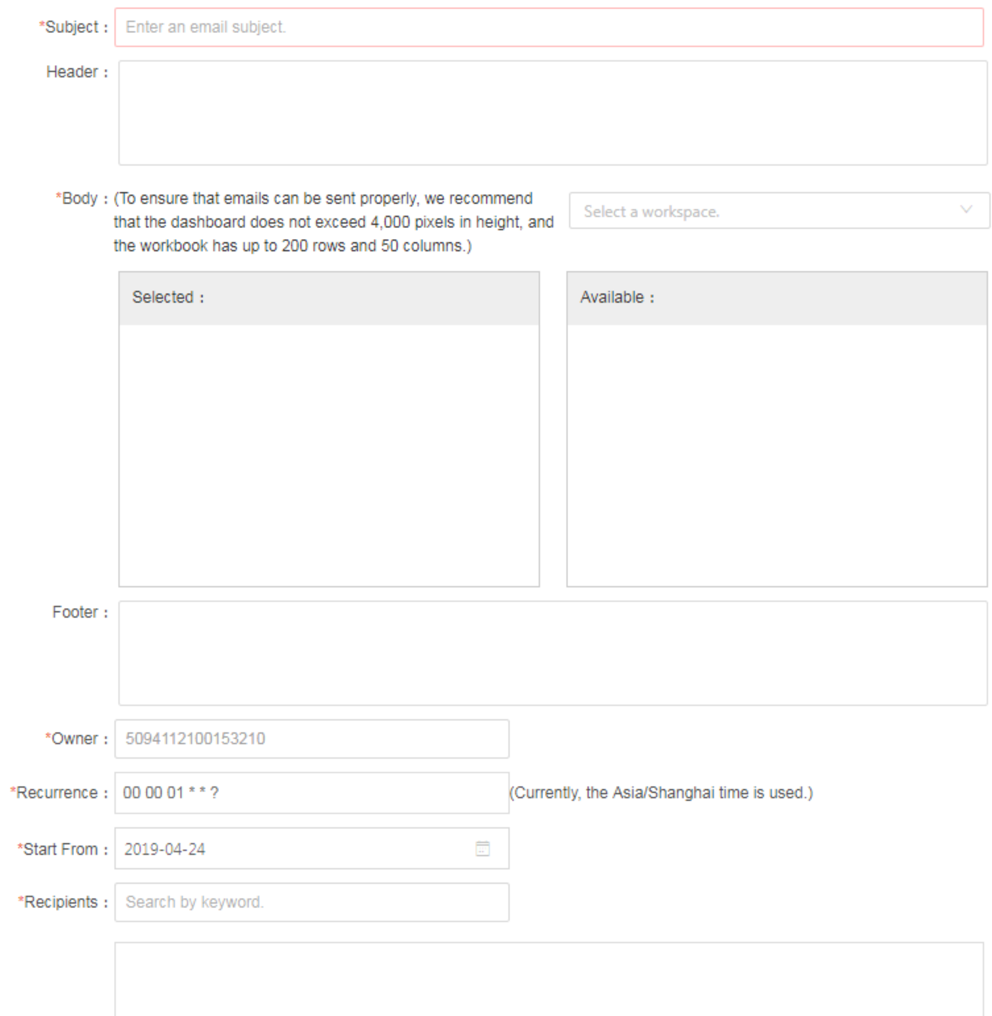
The email subscription feature of Quick BI can periodically send snapshots of dashboards or workbooks to users by using emails. This feature is available only in Quick BI Pro and Quick BI Enterprise Standard.

Procedure

1. Log on to the Quick BI console.
2. Click the **Subscriptions** tab.
3. On the **Email Subscriptions** tab, click **Subscribe**.

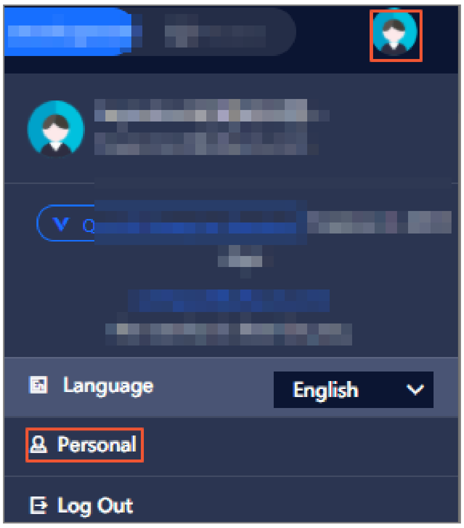


4. On the **Subscribe** page, configure the required parameters. The following table describes these parameters.



Parameter	Description
Subject	The subject of the email.
Header	The header of the email.
Body	◦ The main content of the email, which can be a dashboard or workbook. ◦ You can select **Screenshot(PC)** or **Screenshot(mobile)**. **Note** ◦ If you select a workbook as the email body, you can only select **Screenshot(PC)** and must configure the required parameters of the workbook. ◦ To ensure that the email can be sent, we recommend that the dashboard be no more than 8,000 pixels in height and the workbook be no more than 200 rows or 50 columns.
Footer	The footer of the email.

Parameter	Description
Attachment	This option appears only if you select Screenshot(PC) for Body.
Owner	The user who creates the email subscription. After the parameter is specified, it cannot be changed.
Recurrence	The frequency at which the email is sent.
Start From	The date the email starts to be sent.

Parameter	Description
Recipients	◦ You can select multiple recipients. However, they must use Alibaba Cloud accounts in the same organization. **Note** If an account name is dimmed, the account does not have an email address. Make sure that every recipient has an email address. ◦ You can perform the following steps to set an email address for your account : a. *Move your pointer over the profile picture in the upper-right corner of the homepage.* b. Click **Personal**. In the **Personal** dialog box, set the Email address. 

5. Click **OK**.

2.2. Manage email subscriptions

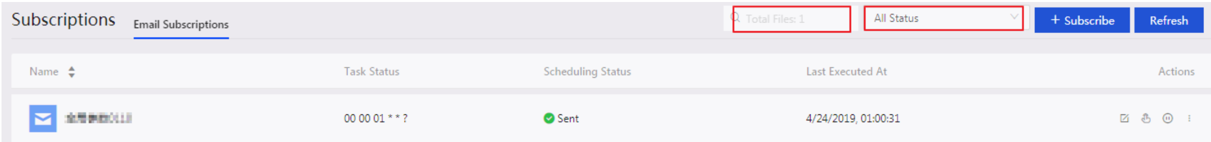
You can go to the subscriptions page to manage the email subscriptions you have created.

The following operations are all completed on the subscriptions page. Follow these steps to go to the subscriptions page:

1. Log on to the Quick BI console
2. Click **Subscriptions** to go to the email subscriptions page.

Search email subscriptions

Enter an email subscription name into the search box and select an email status to search for the email subscription.

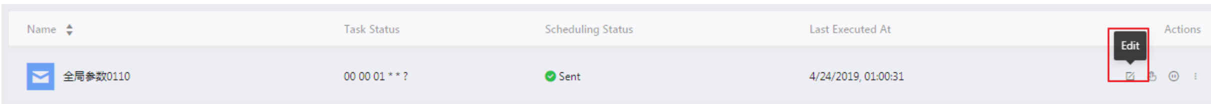


Note The following email statuses are available:

- Pending Schedule
- Sending
- Sent
- Canceled
- Error

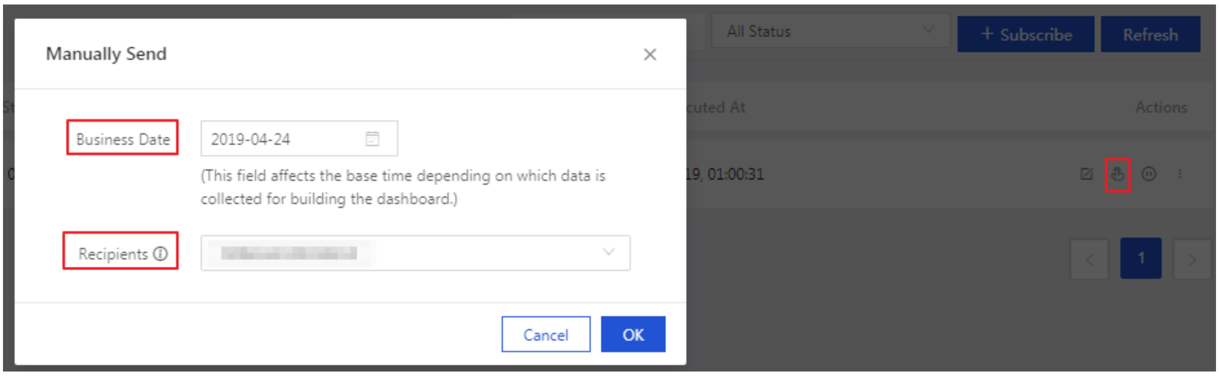
Edit email subscriptions

Click the **Edit** icon to edit an email subscription.



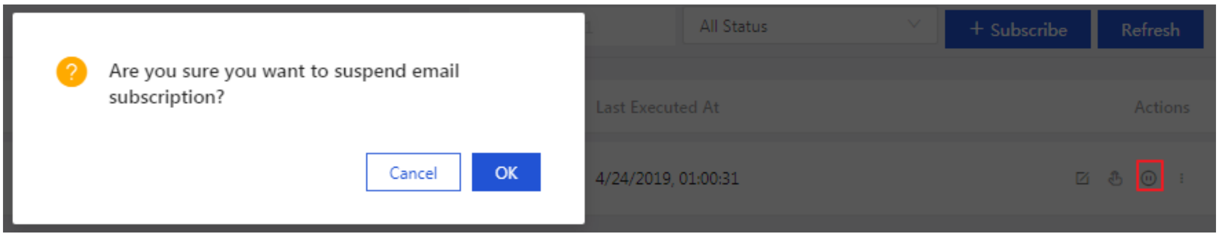
Manually send emails

Click the **Manually Send** icon, and set the business date and recipients in the dialog box. This function ignores the email subscription schedule and sends an email immediately. The business time affects the base time depending on which data is collected for building the dashboard.



Suspend scheduling

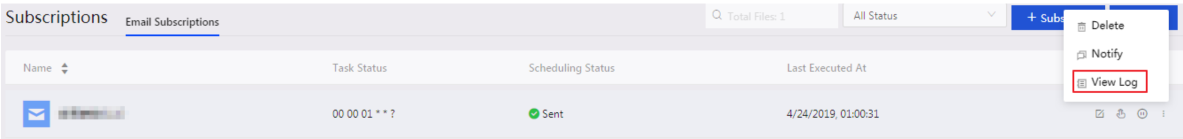
Click the **Suspend Scheduling** icon to suspend an email subscription.



More actions

Click the **More** icon to perform the following actions:

- Delete: delete the email subscription.
- Notify: send a notification to the subscription user.
- View log: view the email subscription log as shown in the following figure. You can check the log when the system failed to send emails.

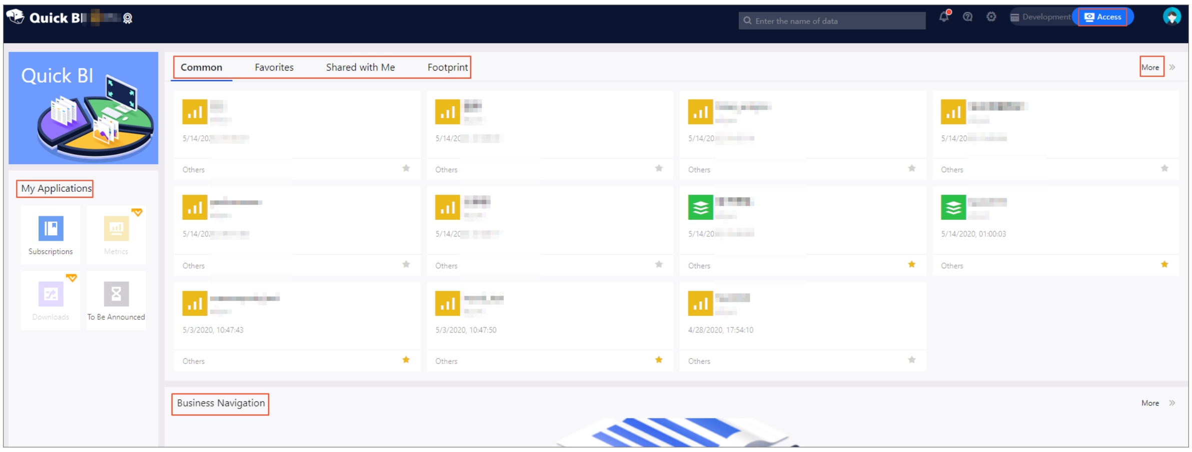


3.Access mode

Quick BI can work in either the development mode or access mode. You can view reports available to you only when Quick BI works in access mode, which provides higher data access efficiency and better user experience.

- You can edit reports in a workspace.

- You can view reports on the **Common**, **Favorites**, **Shared with Me**, and **Footprint** tabs, and in the **Business Navigation** section. You can click **More** in the upper-right corner of a tab or section to show all reports. You can click **My Applications** to go to the target application module and view its data.



Note On the **Footprint** tab, you can view the reports that you accessed in the last 30 days. In the **Business Navigation** section, you can view the top four categories of which you have most frequently accessed reports.