UAccess ANALYTICS

Managing Department Dashboard Access

You've created a nice department or college dashboard and you want to be sure that the right people in your department or college have the right level of access.

If you are the ***Dashboard Owner***, you can manage that access yourself using The University of Arizona's Grouper Group Management tool.

Because Grouper contains and allows users to work with a hierarchical list of organizations, College dashboard owners will be able to add to or edit dashboard lists for departments or other organizations under their purview.

*Note: The **Adding Owners, Editors, or Viewers - Primary Path** instructions can be used by those dashboard owners who currently have the BI_HR_MED data role assigned. If you have not been assigned the requisite data role, but are a college or department dashboard owner, please refer to the **Adding Owners, Editors, or Viewers – Alternate Path** directions on the next page.*

Adding Owners, Editors, or Viewers – Primary Path

1. Log in to UAccess Analytics, and navigate to the **Security > Security > ORG Roles** dashboard.
2. Delete any pre-populated or other values from all prompt fields.
3. Enter your College or Department Code in the **ORG Role** prompt field; click **Apply**.
4. Once the dashboard has refreshed, review the options in the **Manage Dashboard Permissions** section of the dashboard. In the example below, you see links for Owner, Editor, and Viewer level access to the Department 9940 dashboard.

5. Identify the permission level at which you'd like to add a new user; click the link for that level.
6. A new browser tab will open and will navigate to the Grouper tool for the selected level.

7. To add new members, click the orange **Add Members** button.
   a. Rather than searching directly for a new member using the Member Name or ID field, click the *search for an entity* link.
   b. Open the **Choose a data source** drop-down menu and select **LdapSourceAdapter (person)**.
   c. Enter the member's **NetID** in the field; click **Search**.
   d. Once the system has located the new group member, click the **member's name**.
   e. Click **Add**. The member will be added to the selected list, and you will see a message reading **Success: entity was added to group**. Changes may take up to two hours to take final effect.

Adding Owners, Editors, or Viewers – Alternate Path

1. Log in to The University of Arizona's Grouper tool at http://grouper.arizona.edu.
2. Locate the **Quick Links** section of the screen (upper left) and click the **My groups** link.
   You will see the roles to which you are allowed to add users.
3. Identify the permission level at which you'd like to add a new user; click the link for that level.
4. Continue with **Step 7** of the **Primary Path** above.

Removing Owners, Editors, or Viewers

Removing group members is slightly easier than adding members.

1. Follow steps 1 – 5, as above.
2. To remove a specific individual from the selected list, click the **Actions** button to the right of the person's name; select **Revoke membership**. The member will be removed from the selected list, and you will see a message reading Success: entity was removed from the group. Changes may take up to two hours to take final effect.
3. Repeat to remove other individuals.