

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.

Make your selections and click Apply

NetID: Name: ORG Role: Dept:

Manage Dashboard Permissions

- Manage ORG_DEPT_3001_EDITOR
- Manage ORG_DEPT_3001_OWNER
- Manage ORG_DEPT_3001_VIEWER

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.

Home > Root > University of Arizona > Community > UAccess > Analytics > Dashboard Roles > UA Colleges > AADV > 9940 > ORG_DEPT_9940_VIEWER

ORG_DEPT_9940_VIEWER

Member name or ID:

Enter an entity name or ID, or [search for an entity](#).

Assign these privileges: Default privileges Custom privileges

or import a list of members

Search for an entity

eddiec

Exact ID match

Choose a data source:

Entity Name

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**. (See Note below.)
 - 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.

Note: You may occasionally run into difficulties in finding individuals in **Grouper** when searching by name or NetID. In those rare instances, you can try using the person's UAID. You'll find the UAID number on the **Security > Security > Person Roles** dashboard. Use that UAID to search for the person you'd like to add. It *will* work!