

Dynamic Rights For Your Dynamic Viewers



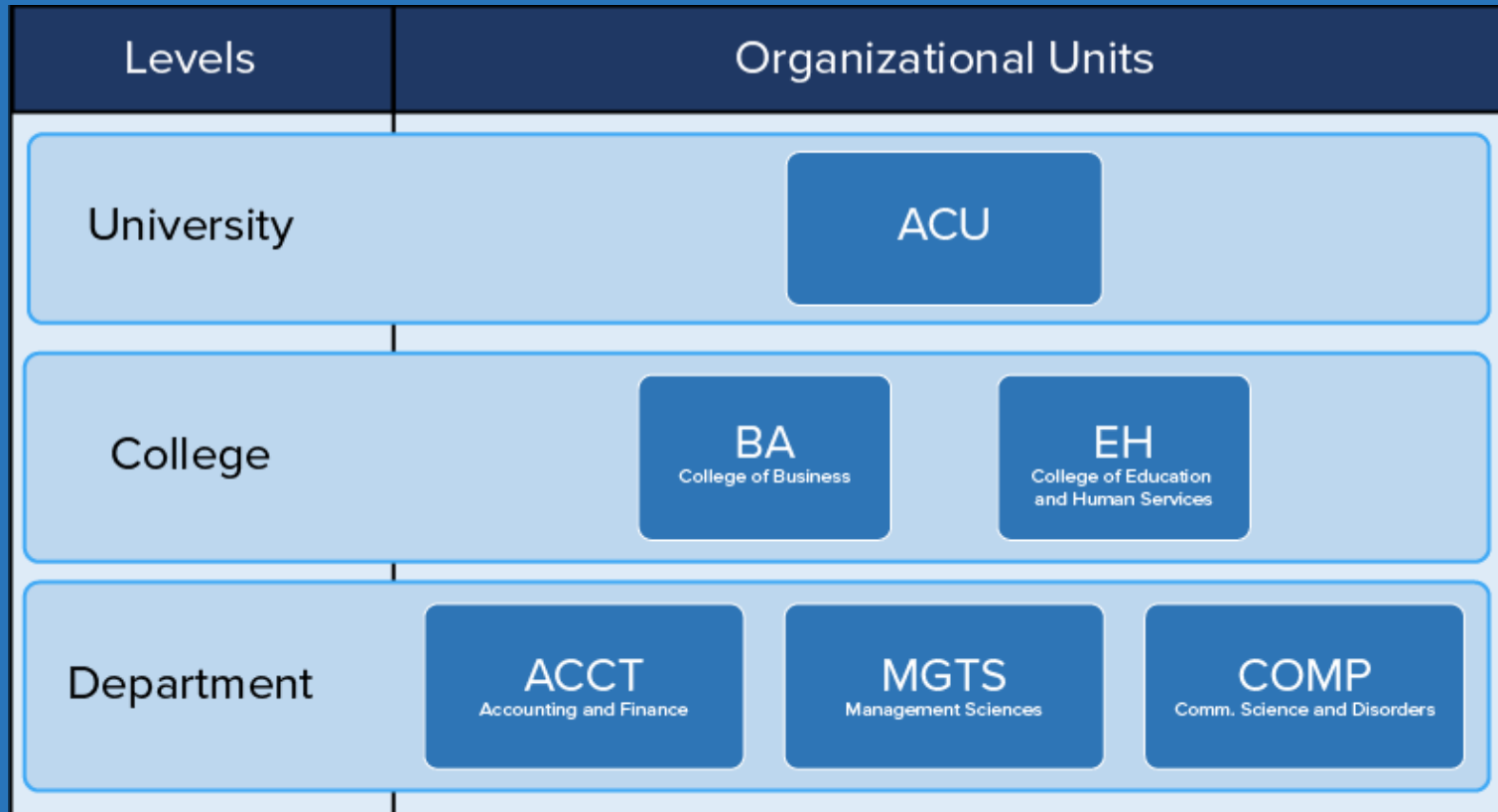
Stephen Rektenwald



What are Dynamic Viewers?

- Organizational structures are often based on hierarchy
- Those roles don't change,
 - but the people in them do
- Dynamic Report Access provides appropriate access automatically, as personnel shifts

Setting Up Your Hierarchy



Use the Visualization to Set a Hierarchy Template and Table for Datasources

Hierarchy Editor

Hierarchy Template

Level 1

Level 2

Level 3

My University

University

College

Department

	A	B	C	D	E
1	Node Id	Node Caption	Parent Node	Parent NodeCaption	Lev
2	My University	My University			1
3	AS	College of Arts and Sciences	My University	My University	2
4	BA	College of Business	My University	My University	2
5	BS	College of Biblical Studies	My University	My University	2
6	DL	College of Grad & Prof Studies	My University	My University	2
7	EH	Education & Human Services	My University	My University	2
8	HC	Honors College	My University	My University	2
9	NU	School of Nursing	My University	My University	2
10	SP	College of Special Studies	My University	My University	2
11	US	University Studies	My University	My University	2
12	ACCT	Accounting and Finance	BA	College of Business	3
13	AE	Agricultural & Envir. Sciences	AS	College of Arts and Sciences	3
14	ARTD	Art and Design	AS	College of Arts and Sciences	3
15	BIMM	Bible, Missions, & Ministry	BS	College of Biblical Studies	3
16	BIOL	Biology	AS	College of Arts and Sciences	3
17	BMFS	Marriage & Fam Studies	BS	College of Biblical Studies	3

Set Organizational Roles

Organizational Role ID	User Role
1	Assistant Chair
2	Assistant Dean
3	Associate Dean
4	Associate Program Director
5	Dean
6	Department Chair
7	Director
8	Program Director
9	Provost

Set Up a Supervisor's Table

Source	Target	RoleId
ACCT	jdn00b	6
AE	jac16d	6
ARTD	ats01a	1
ARTD	mmw03b	6
AS	gbs00a	5
AS	jwc03b	3
AS	lxh14a	3
BA	agl95t	3
BA	cbc06d	5
BIMM	ashlockr	6
BIMM	dck99a	1
BIOL	jrhl1a	1
BIOL	leet	6
BMFS	lvm02b	6
BMFT	lvm02b	6

Define Organizational Settings in Your Project

The screenshot displays the ACU project management interface. At the top, the user is identified as Stephen Rektenwald. The main navigation bar includes 'My Projects' and 'Editing: Student Opinion of Instruction Summer 2020'. The 'Definition' tab is active, showing 'Organizational Links' as the current view. A table lists the existing link for 'My University' with columns for 'Organizational Link', 'Link to Subject', 'Hierarchy', and 'Relationship to Users'. An 'Edit Organizational Links' modal is open, allowing configuration of these settings. The modal includes dropdown menus for 'Organizational Link' (My University), 'Hierarchy' (ACU Hierarchy), 'Link to Subject' (Courses), and 'Relationship to Users' (Supervisors). Below these, a section titled 'Map the subject fields to the hierarchy levels (the first level is optional)' contains three rows: (1) University with a dropdown, (2) College with 'College_Code' selected, and (3) Department with 'Department_Code' selected.

Welcome Stephen Rektenwald
Abilene Christian University

English Sign Out

BLUE ADMIN

My Projects
Editing: Student Opinion of Instruction Summer 2020

Project Shortcuts Manage Project Save Project

Info Questionnaire Definition Subjects Members Triggers Access Tasks Language Publish

General Organizational Links Group Shared Group Subject Filter Secondary Subject Filter Group Filter

Organizational Link	Link to Subject	Hierarchy	Relationship to Users	Edit
<input type="radio"/> My University	Courses	ACU Hierarchy	Supervisors	Edit

Edit Organizational Links

Organizational Link: My University en ★

Hierarchy: ACU Hierarchy ★

Link to Subject: Courses ★

Relationship to Users: Supervisors ★

Map the subject fields to the hierarchy levels (the first level is optional).

(1) University:

(2) College: ★

(3) Department: ★

Define Group Settings in Your Project

Info Questionnaire **Definition** Subjects Members Triggers Access Tasks Language Publish

General Organizational Links **Group** Shared Group Subject Filter Secondary Subject Filter Group Filter

Groups (Last Automatic Update: 7/17/2020 2:01:33 AM)

Results: 1 - 6 of 6 Item(s)

	Group Name	Privileges	Link Type	Group Links To	Edit
<input type="radio"/>	Students <small>(Automatic Update)</small>	FO	Relationship	Courses	Edit
<input type="radio"/>	Instructors RR <small>(Automatic Update)</small>	SV	Relationship	Courses	Edit
<input type="radio"/>	Instructors RV <small>(Automatic Update)</small>	RV	Link	Users	Edit
<input type="radio"/>	Supervisors - Departmental level <small>(Dynamic Viewers)</small>	RV	Organization	Courses	Edit
<input type="radio"/>	Supervisors - College Level <small>(Dynamic Viewers)</small>	RV	Organization	Courses	Edit
<input type="radio"/>	Supervisors - University Level <small>(Dynamic Viewers)</small>	RV	Organization	Courses	Edit

Group Details

Group linked to
 Subject (Courses)
 Secondary Subject (Users)

Group Name
Supervisors - Departmental (M) ★

Link Type
Organization ▼

Organization
My University ▼ ★

Datasource
Users

Level
Department ▼ ★

Organizational Roles ★
 Assistant Chair
 Assistant Dean
 Associate Dean
 Associate Program Director
 Dean
 Department Chair
 Director
 Program Director
 Provost

Privileges
 Rater Selection [RS]
 Rater Selection Signing [RSS]
 Question Personalization [QP]
 Question Personalization Approval [QPA]
 Form Fill Out [FO]
 Fill Out Approval [FOA]
 Report Creation [RC]
 Report Viewing [RV]
 Subject View [SV]
 Subject View Management [SVM]
 Subject Fill Out [SFO]

Enable Report Viewing

BLUE ADMIN

My Reports
Editing: College Report Spring 2020

Report Shortcuts Manage Reports Save Report

Info Content Filters Groups **Viewers** Access Project Mapping Distribution Language Publish

Static Viewers Dynamic Viewers Static Viewers Export / Import

Dynamic Group Connections

Supervisors - Departmental level Disconnected

Supervisors - College Level Connected

Supervisors - University Level Connected

Dynamic Viewers List [Get Latest](#)

Search 10 per page 43 items Page 1 / 5

Report	Report Viewer	User Role	Dynamic Viewer Group
College of Arts and Sciences		Associate Dean	Supervisors - College Level
College of Arts and Sciences		Associate Dean	Supervisors - College Level
College of Arts and Sciences		Dean	Supervisors - College Level
College of Arts and Sciences		Provost	Supervisors - University Level
College of Arts and Sciences		Provost	Supervisors - University Level
College of Arts and Sciences		Provost	Supervisors - University Level
College of Arts and Sciences		Dean	Supervisors - College Level
College of Biblical Studies		Provost	Supervisors - University Level
College of Biblical Studies		Provost	Supervisors - University Level
College of Biblical Studies		Provost	Supervisors - University Level
College of Biblical Studies		Provost	Supervisors - University Level

[Download Dynamic Report Viewers](#)

ACU's Process - Google Sheets



Reports in Blue



File Edit View Insert Format Data Tools Add-ons Help [Last edit was 8 minutes ago](#)



Reports in Blue ▾

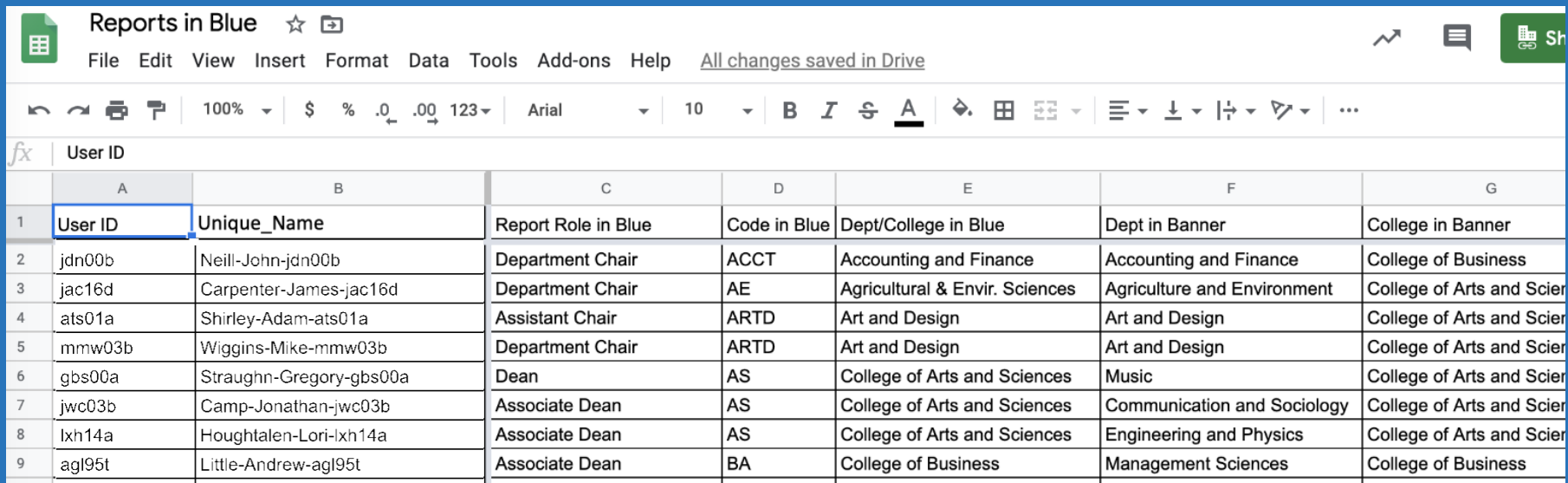
Supervisors Table ▾

Organizational Roles ▾

ACU Hierarchy ▾

Users ▾

ACU's Process - Communication w/ Provost Office



The screenshot shows a Google Sheets spreadsheet titled "Reports in Blue". The spreadsheet contains a table with 9 rows of data. The columns are labeled A through G. The data in the table is as follows:

	A	B	C	D	E	F	G
1	User ID	Unique_Name	Report Role in Blue	Code in Blue	Dept/College in Blue	Dept in Banner	College in Banner
2	jdn00b	Neill-John-jdn00b	Department Chair	ACCT	Accounting and Finance	Accounting and Finance	College of Business
3	jac16d	Carpenter-James-jac16d	Department Chair	AE	Agricultural & Envir. Sciences	Agriculture and Environment	College of Arts and Scier
4	ats01a	Shirley-Adam-ats01a	Assistant Chair	ARTD	Art and Design	Art and Design	College of Arts and Scier
5	mmw03b	Wiggins-Mike-mmw03b	Department Chair	ARTD	Art and Design	Art and Design	College of Arts and Scier
6	gbs00a	Straughn-Gregory-gbs00a	Dean	AS	College of Arts and Sciences	Music	College of Arts and Scier
7	jwc03b	Camp-Jonathan-jwc03b	Associate Dean	AS	College of Arts and Sciences	Communication and Sociology	College of Arts and Scier
8	lxh14a	Houghtalen-Lori-lxh14a	Associate Dean	AS	College of Arts and Sciences	Engineering and Physics	College of Arts and Scier
9	agl95t	Little-Andrew-agl95t	Associate Dean	BA	College of Business	Management Sciences	College of Business

Why is DRA Helpful?

- Distributes all reports in a system that is not in our SIS (Banner).
- Allows me to update access past semesters based on this hierarchy.