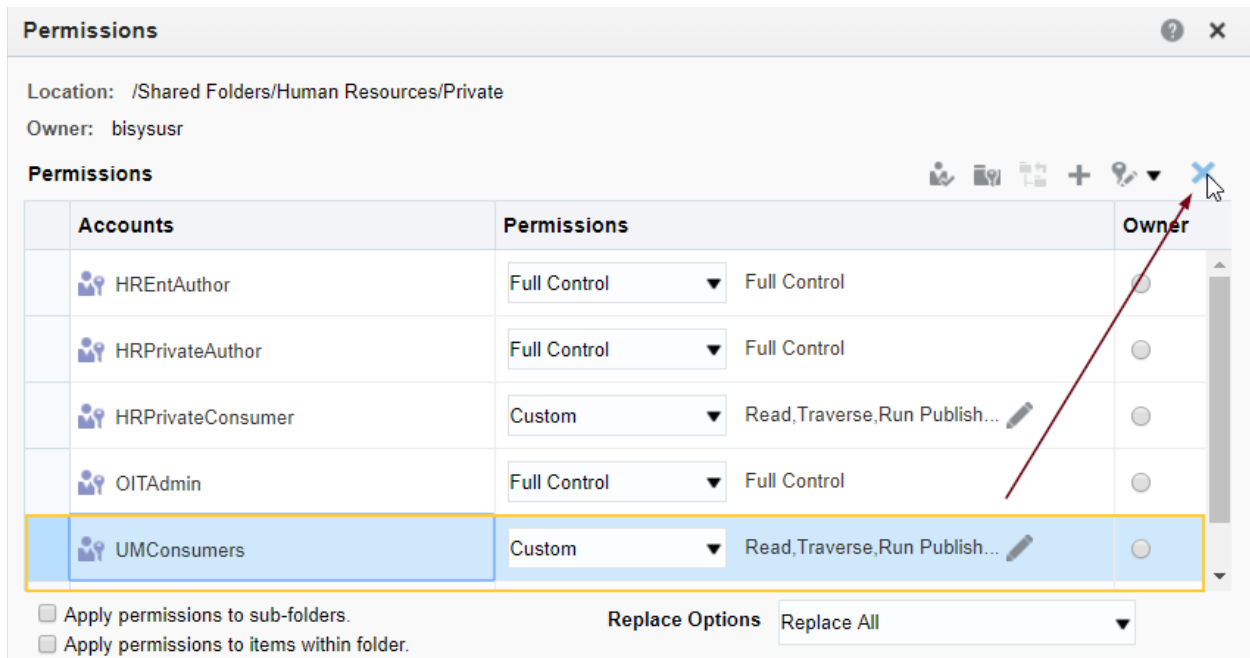
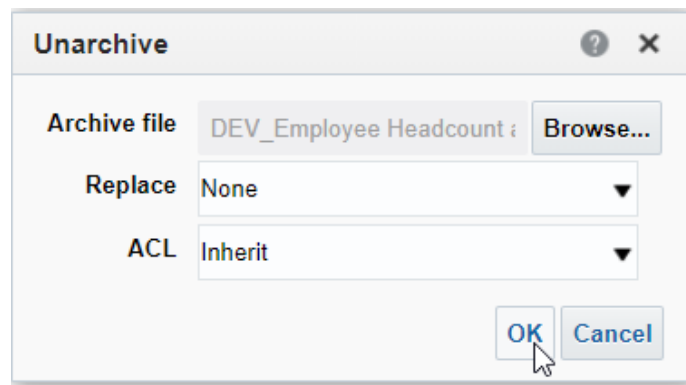


Migrating Dashboards with HR Private Data to UM Analytics Production

1. Remove **UMConsumers** from the HR Private folder in Production prior to migration (THIS IS CRITICAL).
 - a. Make sure that these roles **HRPrivateAuthor** & **HRPrivateConsumers** in the permissions for the folder



2. Keep remaining permissions on the folder (OITAdmins & weblogic)
3. Then migrate the dashboard using "Inherit" to inherit the permissions on the base folder.







4. Then add **UMConsumers** back onto the **HRPrivate** folder itself

Permissions

Location: /Shared Folders/Human Resources/Private

Owner: bisysusr

Permissions

Accounts	Permissions
 HREntAuthor	Full Control Full Control
 HRPrivateAuthor	Full Control Full Control
 HRPrivateConsumer	Custom Read, Traverse, Run Publish...
 OITAdmin	Full Control Full Control

Add Application Roles and Users

Location: /Shared Folders/Human Resources/Private

Available Members

Name UMConsu

Search


List Application Roles

Accounts

 UMConsumers

Selected Members

Accounts

 UMConsumers

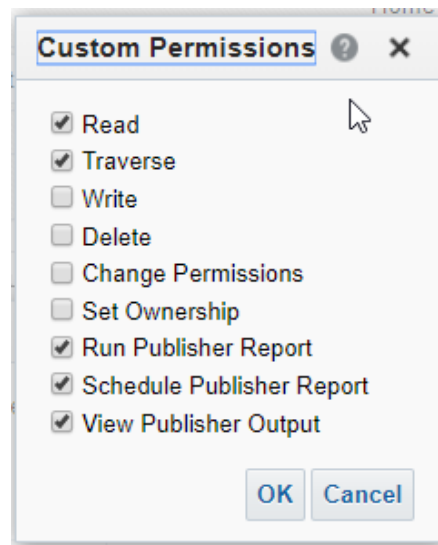
Set Permission to Custom

OK

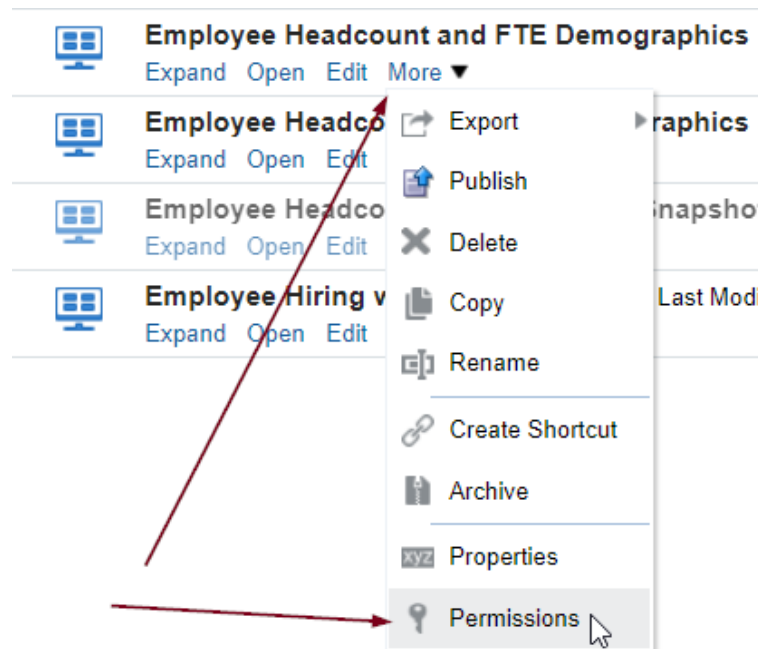
Cancel

Here are the permissions that need to be set for **UMConsumers** to view reports; these should be applied the exact same way in the remaining steps below:

- Read
- Write
- Run Publisher report
- Schedule
- View publish report




5. Then add **UMConsumers** to the dashboard container itself




6. Then add **UMConsumers** to the four objects that need be exposed to view the reports:


a. dashboard layout

	dashboard layout	Last Modified 1/30/2020 10:28:46 AM	Owner System Account
Properties More ▼			


b. Welcome Page

	Welcome Page	Last Modified 1/30/2020 10:29:30 AM	Owner System Account
Open Edit More ▼			

*c. **HRPrivateConsumer** Validation*

	HRPrivateConsumer Validation	Last Modified 1/30/2020 10:29:10 AM	Owner System Account
Open Edit More ▼			

d. Help Resources

	Help Resources	Last Modified 1/30/2020 10:29:57 AM	Owner System Account
Open Edit More ▼			

Following the changes, you can test functionality with a few users that have **HRPrivateConsumer**:

You can also test with users that do NOT have **HRPrivateConsumer** (but DO have **UMConsumer**):

Any question or concerns please reach out to Danny Moncada