

Managing users in the Idera Dashboard

The Users section of the Idera Dashboard Administration view allows users to grant access to other team members or groups, and manage their roles. For more information about user roles, see [Understanding user roles](#). Users with administrative privileges are divided into two groups:

- **Dashboard administrators** - capability to manage access over Dashboard functions as well as individual product functions.
- **Product administrators** - capability to grant access to individual products for which they have administrative rights.



Users must be existing **Active Directory users**. Newly-added users should use their Windows user account with their respective passwords to log in to the SQL Inventory Manager.

To add new users, edit their details (name, subscription, or email address), or remove them, select **Manage Users** in the Administration view, and the Manage Users window displays:

The screenshot shows the Idera Dashboard Administration view. On the left, the 'ADMINISTRATION' sidebar has a 'Manage Users' link highlighted with a red box. A red arrow points from this link to the 'Manage Users' window. The 'Manage Users' window is titled 'Manage Users' and has a 'CLOSE' button at the bottom right. It contains a table with the following data:

Display name	Account	Type	Role	Edit/Delete
Administrator (Simpsons)	simpsons\administrator	USER	IderaDashboard.DashboardAd	
Administrator (Development)	dev\administrator	USER	SQLInventoryManager (sim181).ProductAdministrator	
	simpsons\saumya	USER	SQLInventoryManager (sim181).ProductUser	

Adding a user in the Idera Dashboard

In the Idera Dashboard, access is granted to Windows users or groups. Use the following steps to add a user account:

1. Click **Add User / Group**. Idera Dashboard displays the Add User/Group dialog.

The 'Add User / Group' dialog is shown. It has the following fields and options:

- Account name:** A text input field with a red asterisk. Below it, a note says: "Note: Enter user's Windows account using the form "domain\accountname"."
- Display name:** A text input field.
- Account Details:** Two radio buttons: ☒ User and ☐ Group.
- ☐ Do not timeout the browser session for this account.
- ☐ Send welcome email
- Email Address:** A text input field.
- Product:** A dropdown menu with a red asterisk.
- Role:** A dropdown menu with a red asterisk.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom right.

2. Type the name of the user to which you want to grant access. Enter a Windows user name in the format `<domain>\accountname>`.
3. *Optional.* In the **Display name** field, type the common name you want SQL Inventory Manager to display when in use.
4. In the **Account Details** field, select **User** or **Group**.

5. *Optional.* Check **Do not timeout the browser session for this account** if you want the user to be able to remain logged in to SQL Inventory Manager after a period of inactivity.
6. *Optional.* Check **Send welcome email** to provide the new user with an email message containing information about the product and URL for the Idera Dashboard console.
7. Type the email address where you want the system to send alert email messages to this new user account.
8. In the **Product** field, select the product name to which you want to add this new user account.
*If you select **Idera Dashboard** in the **Product** field*, the **Role** field allows you to select from the Dashboard Administrator and Dashboard Guest roles.
*If you select **SQL Inventory Manager** in the **Product** field*, the **Role** field allows you to select from the Product Administrator, Product User, and Product Guest roles.
9. In the **Role** field, select the role you want to assign to this new user account. For more information about the permissions available to each user role, see [User role permissions](#).
If you want to add more roles to this user account or group , click **ADD MORE**. Idera Dashboard displays additional **Product** and **Role** fields for you to add another role.
10. Click **SAVE**.

Editing a user in the Idera Dashboard

Clicking the Edit icon for an existing user account allows you to edit the account name, enable or disable the user account, and add new permissions. Use the following steps to edit a user or group:

1. In the list of users, click the **Edit** icon for the user account you want to edit. Idera Dashboard displays the Edit User/Group dialog.

Edit User / Group ? X

Account name: * simpsons\saumya x
 Note: Enter user's Windows account using the form "domain\accountname".

Display name:

Account Enabled: ☒

Product: SQLInventoryManager (sim181) Role ProductUser x

Add New Permission

SAVE CANCEL

2. Make the necessary changes. *If you want to add more roles to this user account or group* , click **Add New Permission**. Idera Dashboard displays additional **Product** and **Role** fields for you to add another role.
3. Click **SAVE**.







Removing a user from the Idera Dashboard

Clicking the Delete icon for an existing user account or group allows you to remove that account from access to the Idera Dashboard. Use the following steps to delete a user or group.

1. In the list of users, click the **Delete** icon for the user account or group that you want to delete. Idera Dashboard displays a warning message that requires a confirmation whether you want to delete that selection.

Manage Users

[Add User / Group](#)

Display name	Account	Type	Role	Edit/Delete
Administrator (Simpsons)	simpsons\administrator	USER	IderaDashboard:DashboardAd	 
Administrator (Development)	dev\administrator	USER	SQLInventoryManager (sim181).ProductAdministrator	 
	simpsons\saumya	USER	SQLInventoryManager (sim181).ProductUser	 

[CLOSE](#)

2. Click **Yes**. Idera Dashboard removes the user account or group and they can no longer access the Idera Dashboard using the account. ***If you did not mean to delete the selected account, click No.***

Need more help? Search the [Idera Customer Support Portal](#).

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