Group Visibility and Grouper Setup

When a user submits an invoice via the Accounts Payable Supplier Invoice Upload Only portal, their access to view the associated invoices depends on their group membership in Grouper.

- **If the user is part of a department-specific group** in Grouper, then **any member of that group** should be able to log into the dashboard and view the invoices.

- **If the user is not part of any group**, then only that individual user will be able to log into the portal and view the invoices they submitted.

On the first page of the form (after clicking 'Begin this Form'), users will see a "Submitter (Individual or Department):" label followed by either their Andrew ID or the name of the group that they are a member of. This indicates who the invoice will be visible to in the dashboard.

Grouper groups will be created by ECM support, and memberships will be maintained by the designated group admin.

To set up a Grouper group for dashboard visibility:

1. Users should request to create a group under the APDashboard folder by emailing ecm-help@andrew.cmu.edu with the name of their requested group as well as the name and Andrew ID of the individual who will act as the group admin.

2. ECM support will create the Grouper group with the requested name, add the requestor as the group admin, and provide instructions for how the admin can manage their new group's memberships.

3. The group admin can then add all individuals to the group who they wish to have visibility into their group's submitted invoices.

Note: The Invoice Status Dashboard only supports membership in a **maximum of one** group under the APDashboard Grouper folder. Individuals should only belong to one APDashboard group to ensure that their invoices are submitted on behalf of the correct group.