



# USER ROLES

**User Roles Overview** 

User Roles provide an organization with control over what individual users can do within Salesforce Radian6. The five User Types are:

- **Full User** This type of user has full access to the system. Users can configure Topic Profiles, update Topic Profiles, and have full control over the Radian6 Analysis Dashboard.
- **Requisitioner** This type of user has limited access to Topic Profile Configuration. An e-mail will be sent to a designated person requesting approval when they attempt to set up a new Topic Profile (they will see a popup notification informing them that an approval is required).
- **Dashboard User** Users of this type can adjust widgets and have full control over their Dashboard. They cannot create new Topic Profiles or reconfigure existing Topic Profiles.
- **Read-Only User** Users will have access to pre-defined dashboards. They cannot adjust/create widgets or Topic Profiles, and cannot create new Topic Profiles.
- Engagement Console Only Users will only have access to the Engagement Console and will not be able to access the Radian6 Analysis Dashboard.
- **Super User** The Super User role is an administrative role for your Radian6 environment. Super Users can add, delete, change and re-assign people's User Roles, and have all the Radian6 environment access of a Full User.





# ANALYSIS DASHBOARD SUPER USERS Client Details

If you are a Super User, you can view the Client Details section of the Configuration menu. From this menu, you can view attributes of Users within your environment including:

- Name
- Email Address
- User ID
- Created Date
- Role
- Status

	Dashboard	Configura	tion Insi	ghts Manage	Help	
Topic Profiles	Account Deta	ils Clie	nt Details	Projects	Source Filters	Alerts
Client Details						
List All Users   Li	st All Topic Profile	IS				

Configuration/Account Details View

You can also disable or enable existing Users:

- 1. Select the desired User.
- 2. Click on the **check mark** in the Enabled column (check to enable or un-check to disable).

Role	Enabled
Super User	<ul> <li>Image: A start of the start of</li></ul>
Super User	
Super User	<ul> <li>Image: A start of the start of</li></ul>
Super User	<b>v</b>
Full User	<b>v</b>
Full User	
Full User	<b>v</b>
Full User	
Full User	
Full User	

Enable and Disable Users





## Add New User

To Add New User, take the following steps:

1. Click Add New User. The Radian6 Add New User Form displays.



Radian6 Add New User Form

- 2. Insert Display Name, Email/Username and select the desired Role.
- 3. Click Submit.

Note - If you are trying to add a user the email domain must match the domain set up for the organization and the email/username field must be populated with a unique email address not previously used in Salesforce Radian6.

#### **Edit Existing User**

To Edit a User:

- 1. Select User from the Client Details list.
- 2. Click Edit User.



Client Details Button - Edit

- 3. Modify Display Name, Email/Username and Role.
- 4. Click Submit.

Note - Information from the Users or Topic Profiles lists can be exported to a comma-separated values format (CSV), by using the Export to CSV button.





## **Topic Profile Details**

Within the Client Details tab you can view details of all the Topic Profiles in your environment. Click on the List All Topic Profiles option at the top left of the window.

This allows you to view attributes of Topic Profiles within your environment including:

- Topic Profile ID Number
- Name
- Owner
- Created Date
- End Date
- Days of Historical Data
- Estimated Monthly Volume
- Status
- Billing Code

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Topic Profiles	Account Details	Client Details	Projects	Source Filters	Alerts
Client Details					
List All Users	ist All Topic Profiles				

List All Topic Profiles

## Have questions? Contact us:

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# SUPER USERS WORKSPACES AND PERMISSIONS

# Manage Team Overview

If you are a Super User, you will have a Manage Team option under the File menu. Here you will find the options for Workspaces and Permissions.

ile Edit Help			
Check For Updates	Ctrl+Shift+U		
Preferences	Ctrl+,		
Accounts	Ctrl+1		
Manage Extensions	Ctrl+T		
Extension Gallery			
Manage Team	•	Workspaces	Ctrl+E
Salesforce	•	Permissions	Ctrl+R
Logout			
Quit	Ctrl+Q		

Workspaces and Permissions

## Workspaces

A Workspace is a predefined layout that allows you to control which Stacks a user can see when they log into their Engagement Console. This enables you to control what users within your environment are able to access.

To create a new Workspace, take the following steps:

- 1. From the Engagement Console header menu, select File.
- 2. Click the **Workspace** option.
- 3. The Manage Team Workspaces screen displays.



Saved Workspaces:	Save Current Worksp	Create N	lew Blank Wo	rkspace	Assign	Team Members
Name	Description		Assigned	Delete	Show:	Assigned All
New User	Workspace for new employees of Rad	ian6	2	â		
Training Team				Ê		Deselect All
Community Manager Worksr	Workspace for Radian6 Community M	anagers	0	â	Search	Team Member 🛛 🗙
Executives			1	<b>a</b>		
Test workspace			0	â		Admin
Support Space			1	â	9	
						Ali Lee
					( <b>1</b>	amessocial
						lasmin Jones
						atrinasocial
						Crystal
						.eesa Robertson - Sc
					<b>m</b> ,	Aark

Workspace Pop-Up Window

- 4. The Workspaces pop-up window displays the Workspaces available to you.
- 5. Assign users from the list available to these existing Workspaces.

#### Create a New Workspace

- 1. To create a new Workspace, complete the following steps:
- 2. Click Create New Blank Workspace.

nter a Na create the	ne and Description Feam Workspace. T	(optional). Click Sa his will log you ou	we to t of the
ngageme 'eam Worl	nt Console and allo space after login.	w you to edit the n	ew
Vorkspace	Name:		
	Barrand and a second		
Vorkspace	Description:		
Vorkspace	Description:		

Workspace Name and Description





- 2. In the appropriate fields, enter a Name and Description for the workspace.
- 3. Click Save.
- 4. The Engagement Console will log you out and back in. You can then edit the layout of your new Workspace.
- 5. Build out the Stacks you want this Workspace to contain. By loading only those Stacks you would like the users to see.
- 6. Assign users to the Workspace.

Note - Setting up a pre-defined Workspace lets your users know which Stacks are most important for them to monitor. Workspaces also provide a means of sharing social media accounts across a group of users without individuals needing to set them up and without having to share account credentials.

#### 7. Click Save Workspace State.

Note - Notice the Editing Workspace: Community and Save Workspace State that appears while in this editing mode. This notifies you that you are Creating a Workspace.



Building a Workspace





#### Permissions

Permissions are different sets of rules that you can apply to user accounts. You can give or take away Permission to access certain features of the platform.

To set up a Permission, take the following steps:

- 1. From the Engagement Console header menu, click File.
- 2. Click **Permissions**.
- 3. The Manage Team Permissions pop-up box appears.

Permission Sets:		New Permission Set		Assign Team Members	
Name	Description	Assigned	Delete	Show: Assigned All	
New User Permissions	Permission set for new employees of Radian6	2	<b>a</b>	Developed All	
Training Team Permissions	Permissions for Training Team	0	Ê	Deselect All	
Support		1	â	Search Team Member	
				Admin	
				Ali Lee	
				jamessocial	
				Jasmin Jones	
				katrinasocial	
				Krystal	
				Leesa Robertson - Sc	
				Mark	

Manage Team Permissions Pop-Up

You can create different permission sets for different users such as:

- Allowing or disallowing the creation of Stacks.
- Blocking people from responding from the console via Twitter.





#### Modify Permissions

To modify existing Permissions, complete the following steps:

- 1. Select Permission.
- 2. Click Edit Permission Set.
- 3. Select Permissions to include by clicking the appropriate check box or deselecting permissions to exclude.

To create a new Permission:

- 1. Click **New Permission Set**.
- 2. Insert Name and Description.
- 3. Deselect Permissions you wish to exclude.
- 4. Select **Save Permission Set**.

#### Exceptions

Exceptions enable you to omit specific portions of Permissions. You can customize your permission sets to fit your needs. To create an Exception, complete the following steps:

- 1. Access an existing Permission.
- 2. Click Edit Permission Set.
- 3. Choose the Stack Type for which you wish to add an Exception.
- 4. Select the Permission you wish to modify.
- 5. Click Add Exception.
- 6. Select the Value you wish to apply (Yes or No).
- 7. Click Save Permission Set.

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