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:

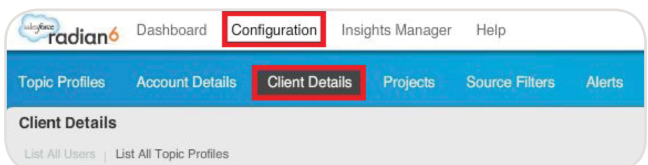
- **Full User** - This type of user has full access to the system. Users can configure Topic Profiles, update Topic Profiles, and have full control over the Radian6 Analysis Dashboard.
- **Requisitioner** - This type of user has limited access to Topic Profile Configuration. An e-mail will be sent to 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



Configuration/Account Details View

You can also disable or enable existing Users:

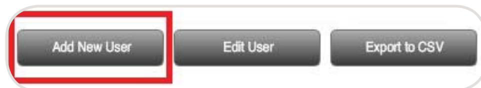
1. Select the desired User.
2. Click on the **check mark** in the Enabled column (check to enable or un-check to disable).

Enable and Disable Users

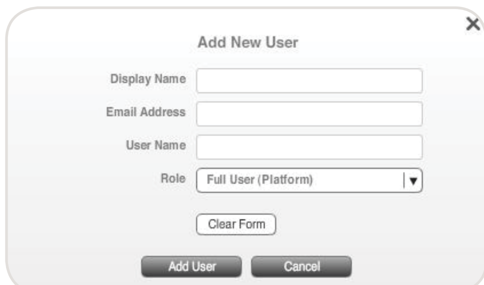
Add New User

To Add New User, take the following steps:

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



Client Details Button - Add



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**.

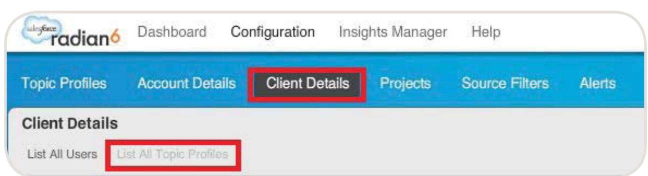
Note - Information from the Users or Topic Profiles lists can be exported to a comma-separated values format (CSV), by using the Export to CSV button.

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



List All Topic Profiles

Have questions? Contact us:

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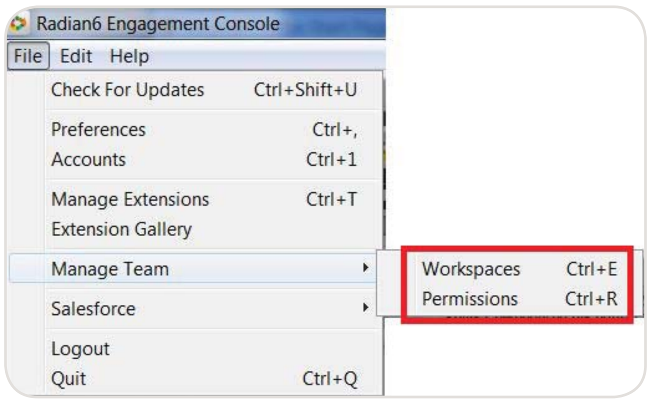
SUPER USERS WORKSPACES AND PERMISSIONS

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.



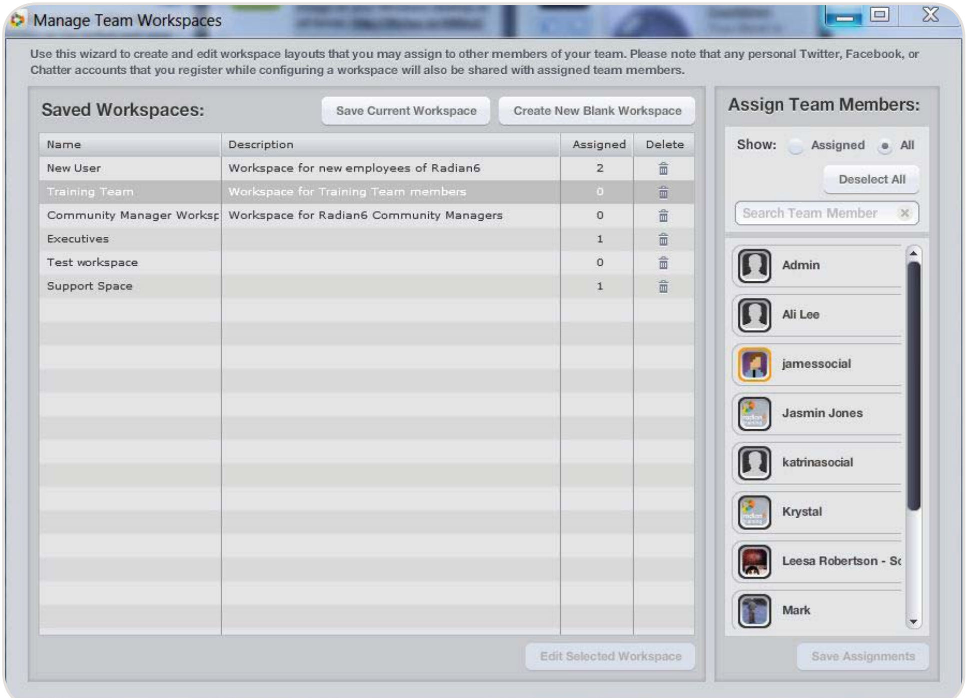
Workspaces and Permissions

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.



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**.

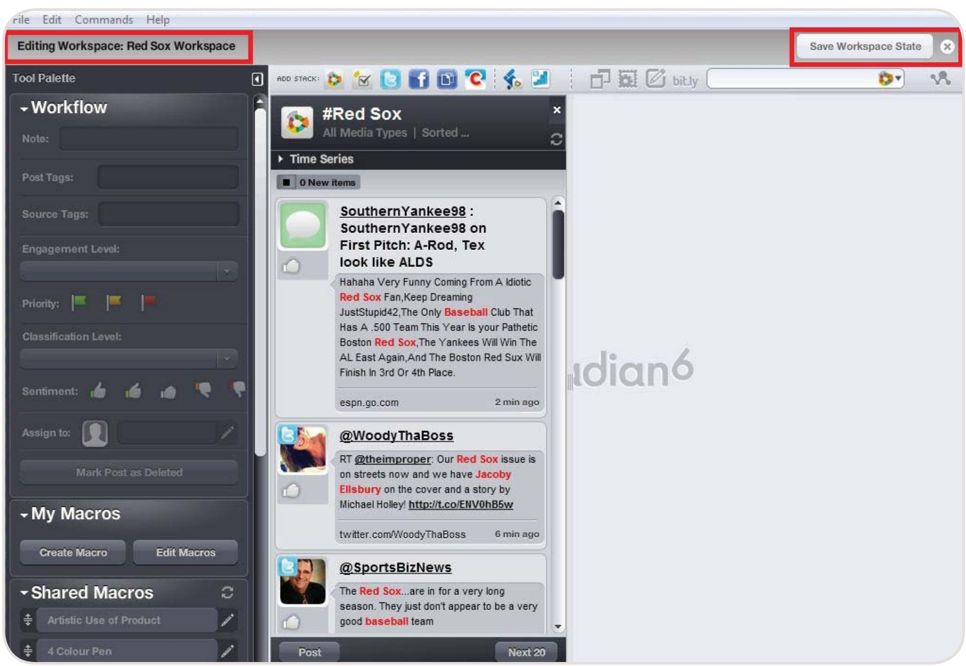
Workspace Name and Description

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.



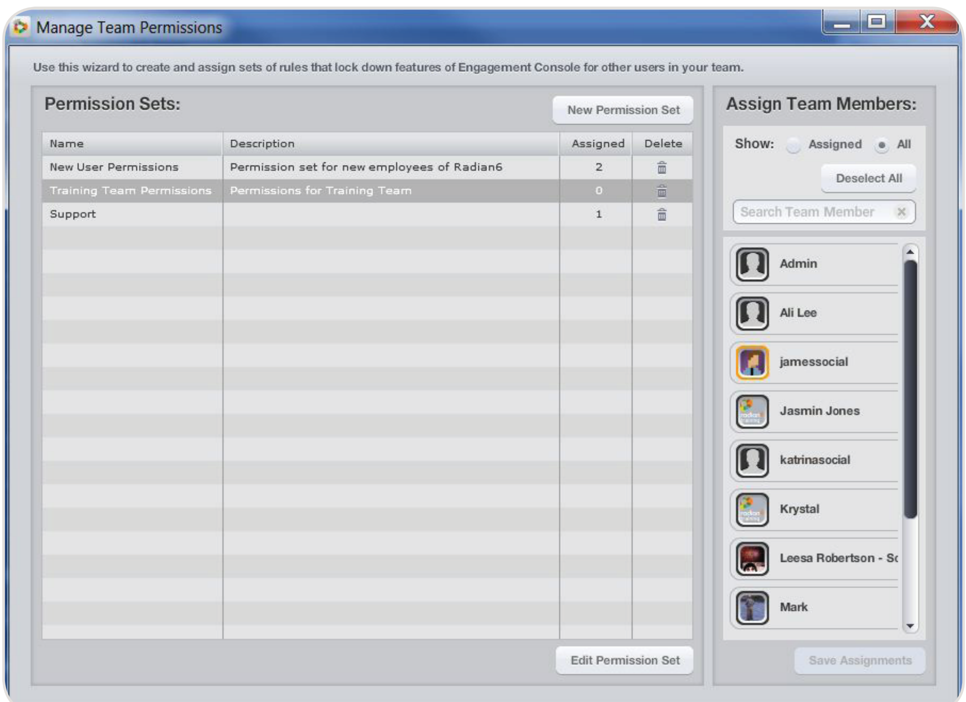
Building a Workspace

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.



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 Se**t.

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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