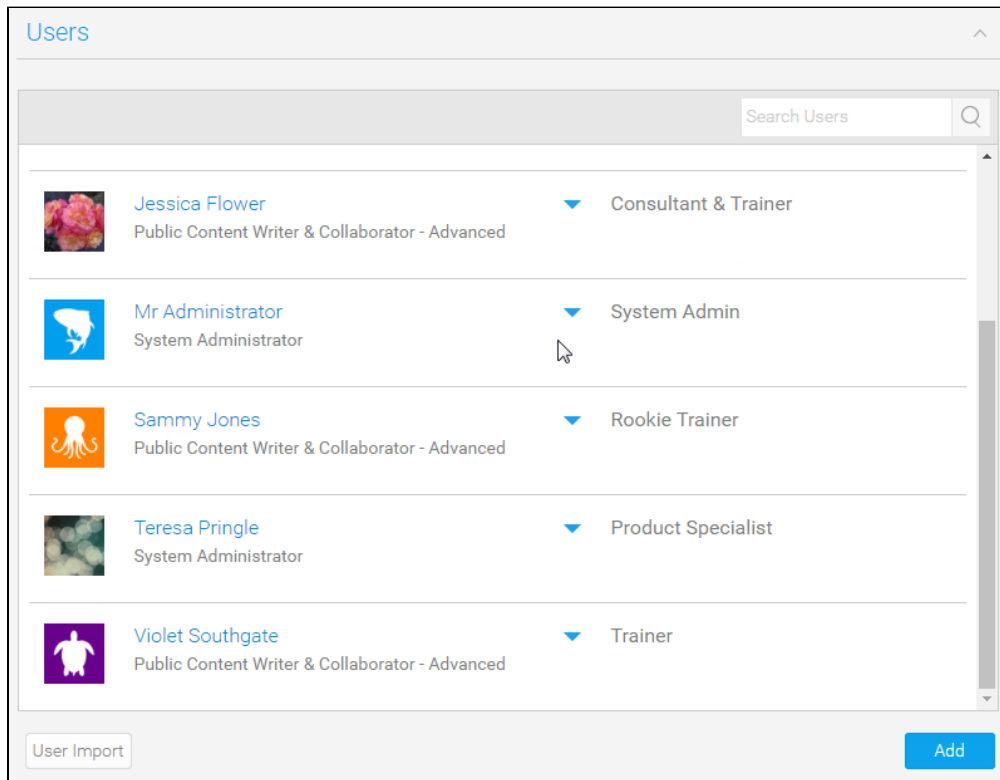


Users

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User List

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Access to system is based on users logins. Through the Admin Console administrators can create, edit and delete users within the application. The user list provides administrators with the ability to browse all the users within the system. To access this list click expand the **Users** section in the main panel of the Admin Console.



The screenshot displays the 'Users' management interface. At the top, there is a search bar labeled 'Search Users' with a magnifying glass icon. Below the search bar is a list of five users, each with a profile picture, name, role, and a dropdown arrow. The users listed are:

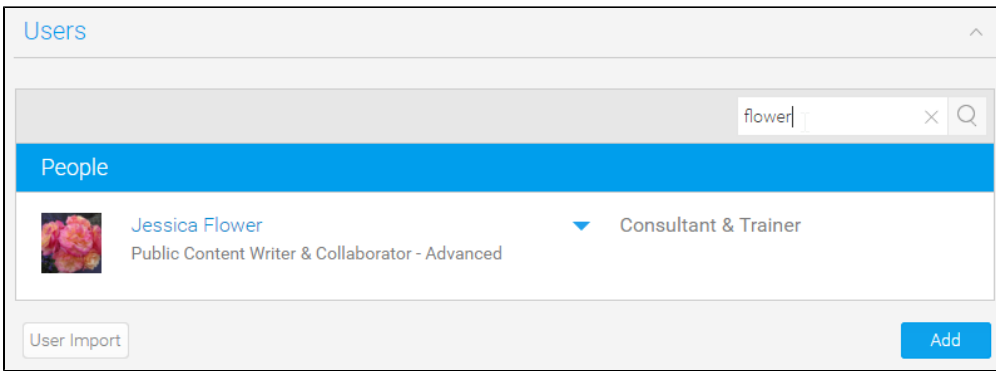
Name	Role
Jessica Flower Public Content Writer & Collaborator - Advanced	Consultant & Trainer
Mr Administrator System Administrator	System Admin
Sammy Jones Public Content Writer & Collaborator - Advanced	Rookie Trainer
Teresa Pringle System Administrator	Product Specialist
Violet Southgate Public Content Writer & Collaborator - Advanced	Trainer

At the bottom of the interface, there is a 'User Import' button on the left and an 'Add' button on the right.

Search Users

If you have many users and you want to find a specific user you may have to use the search box at the top of the user list.

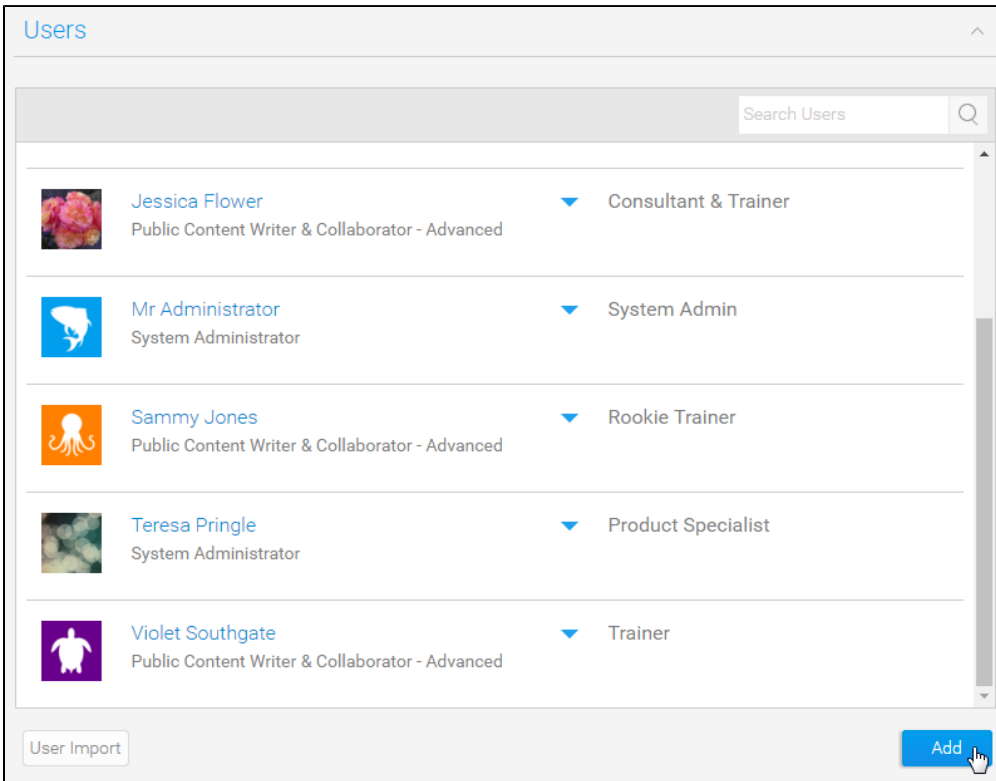
1. Type in the users first or last name into the search box.
2. A list of users matching your query will be returned.



Add User

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In order to create a new user you will need to click the **Add** button under the user list in the Admin Console.



This will open a User Details form that will need to be completed to set up the user. The user details required are as pictured.


User Admin Create User

Let's make this easy.
You can create and edit users here.

Need help?
Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.

Create User

User Profile

 First Name
Last Name
Email
Consumer & Collaborator
This user can only access public content and contribute to collaborative features such as streams, timeline, etc.
Job Title
Job Description

User Status
User is active Active

Password

Password
Confirm password






Bulk User Import

If you need to create a large number of users at once it's possible to do this by using the Bulk Import process.

1. Click on the **User Import** button at the bottom of the user list in the Admin Console.

Users

Search Users

	Jessica Flower Public Content Writer & Collaborator - Advanced	▼ Consultant & Trainer
	Mr Administrator System Administrator	▼ System Admin
	Sammy Jones Public Content Writer & Collaborator - Advanced	▼ Rookie Trainer
	Teresa Pringle System Administrator	▼ Product Specialist
	Violet Southgate Public Content Writer & Collaborator - Advanced	▼ Trainer

User Import

2. You users should be contained in a CSV format with data contained within quotes. See the example below and on the screen for more detail. The example file format is as follows:

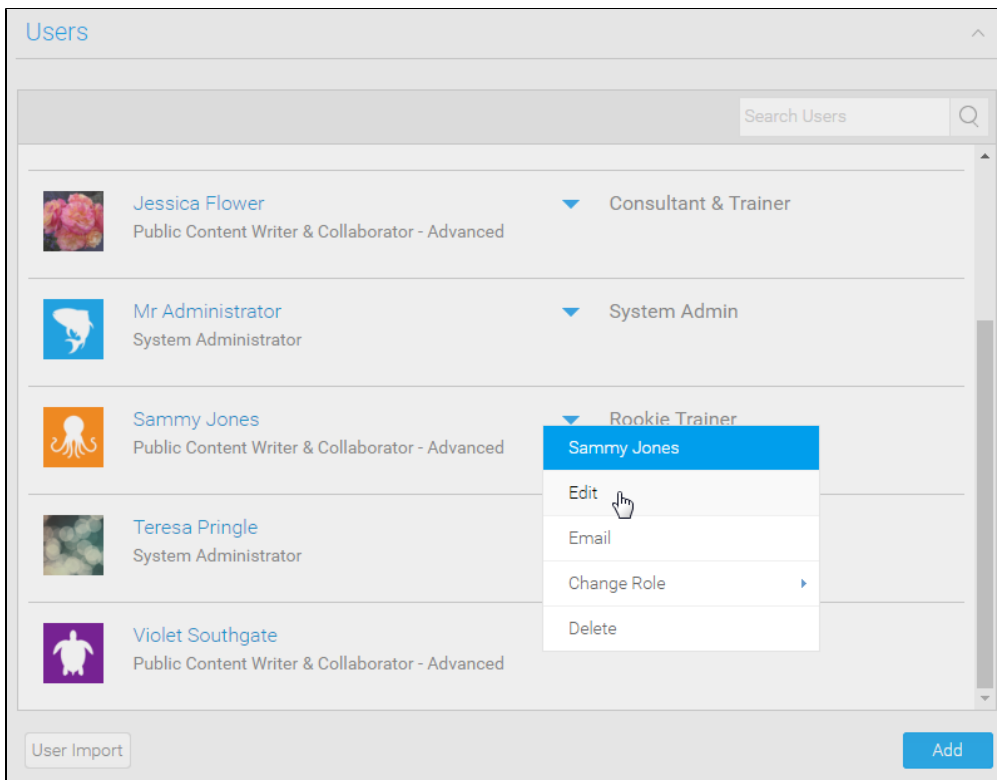
```
# Comments can be present. Starting with a # only. Blank lines will also be skipped.
# First Name, Last Name, Initial, Salutation Code, Language Code, Time Zone Code, Email Address,
UserName, Password, Role Code
"Bob", "Jones", "A", "MR", "EN", "", "bob.jones@company.com", "bob.jones@company.com", "password",
"YFADMIN"
```

3. Click the **Choose File** button to locate and load your file.
4. Click the **Upload** button to load and save your new users.

Edit User

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From time to time users may require changes to be made to their account, from updating their name, to changing their password. Any changes can be made by locating the user in the users list, selecting the drop down menu next to their record and choosing the **Edit** option.



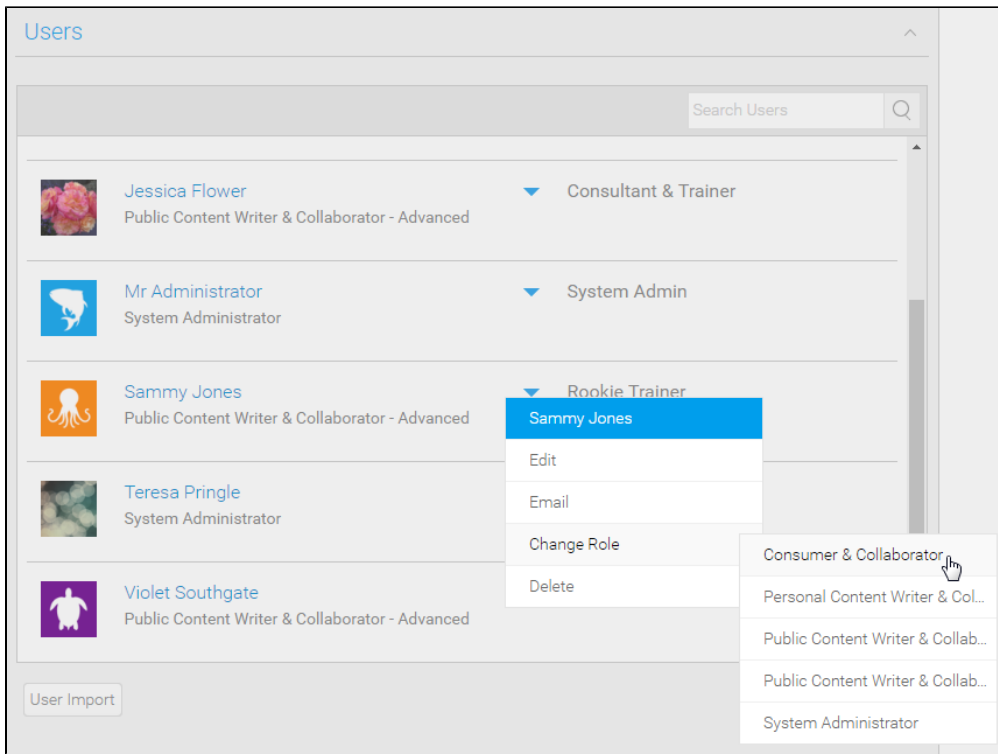
The screenshot shows a web interface titled "Users" with a search bar and a list of users. The users listed are Jessica Flower (Consultant & Trainer), Mr Administrator (System Admin), Sammy Jones (Rookie Trainer), Teresa Pringle (System Administrator), and Violet Southgate (Public Content Writer & Collaborator - Advanced). A dropdown menu is open for Sammy Jones, showing options: Edit, Email, Change Role, and Delete. The "Edit" option is highlighted with a mouse cursor. At the bottom of the interface, there are "User Import" and "Add" buttons.

From here you will be taken to the User Details page where you can make adjustments to their account.

Change Role

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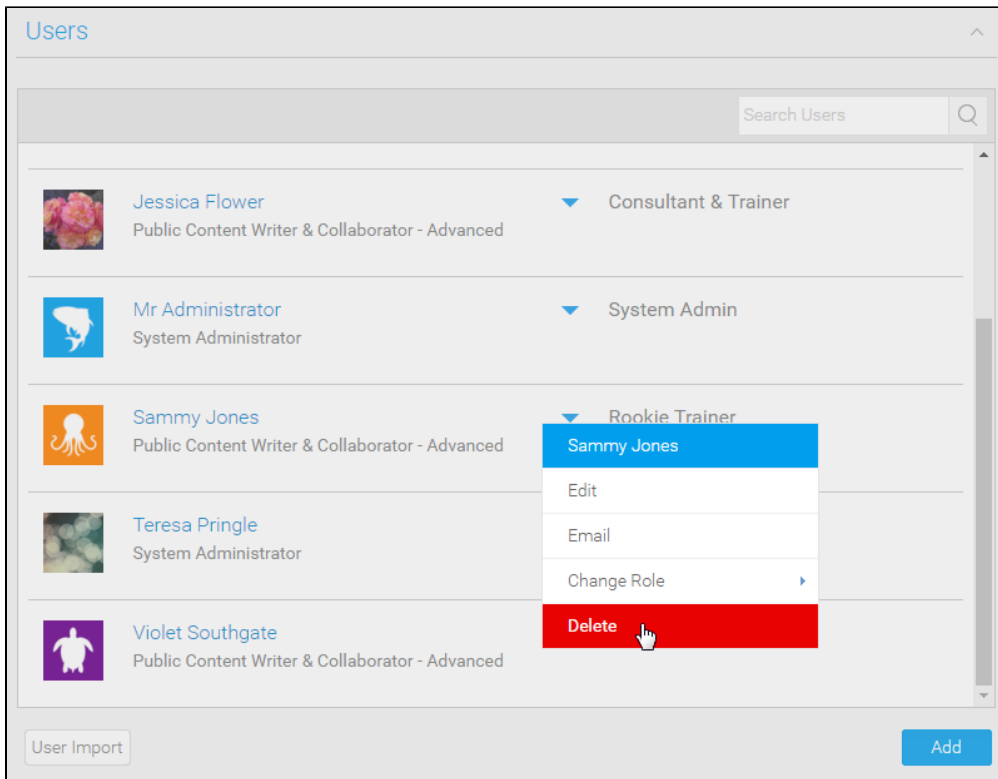
A user's role permissions can be changed through the edit process outlined above, or you can simply select the **Change Role** option from the drop down menu next to a user's name and select a different role.



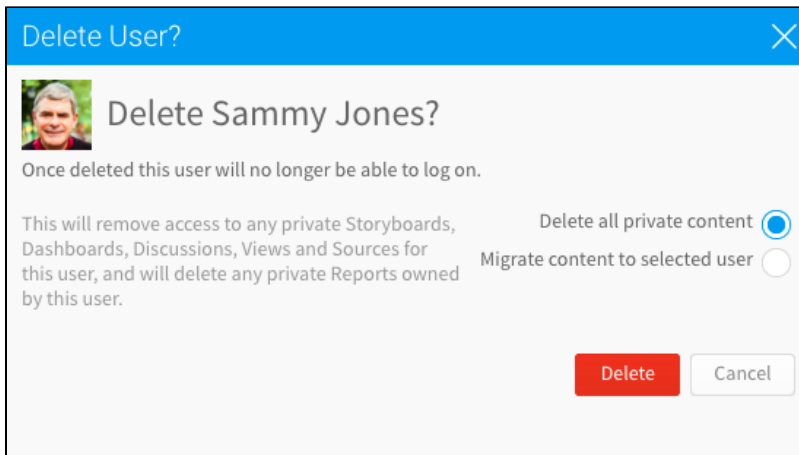
Delete User

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To remove a user's access to the system you will have to delete their account. Click on the drop down menu next to a user in the Admin Console and select the **Delete** option.



You will then be prompted to confirm the remove of the user on a separate page.



Migrate Private Content



When deleting a user, you have the option to delete the private content that they've created, or move that content to another user. This ensures that content does not get deleted or become inaccessible when a user is removed from the system.

Note: If the specific user is a member of multiple client organizations, then you can choose whether to remove them from all organizations, or the current one.

This will make the selected user the owner of any private Reports and will add delete access for any private Storyboards, Dashboards, Discussions, Views and Sources that the deleted user has.

Delete all private content
Migrate content to selected user

Search

	Sammy Jones sj@data.com	✕
	System Administrator admin@yellowfin.com.au	

Delete Cancel

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