



# Webtrekk **CAMPUS**



## User Management

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With Webtrekk User Management, individual rights and approvals can be assigned to each user.

## Key functions:

- Individual configuration and assignment of rights for each login.
- Flexible group management for working effectively (user groups/user roles).
- Sharing and approving elements (e.g., reports, custom metrics, segments, etc.) for other users.

In Webtrekk, each login is called a user.

- A user can see more than one account, if applicable.

*Example for more than one account:*

- Live/test account
  - Different domains
- Switching between the accounts is possible at any time via “Home” or a drop-down in the header area.

The screenshot displays the Webtrekk user interface. At the top, there is a navigation bar with icons for Home, Configuration, Support center, Sitemap, Logout, and Other Accounts. A dropdown menu is open, showing '1. Knigge DE' as the selected account. Below this, there are buttons for Start, My Reports, Bookmarks, Overlay, Visitors, Marketing, Navigation, and E-Commerce. The main content area shows a table with columns for Account and Selected. The table lists two accounts: '1. Knigge DE' (selected, marked with a green checkmark) and '2. Knigge AT' (not selected, marked with a red X). An orange arrow points from the 'Home' button in the navigation bar to the '1. Knigge DE' row in the table.

Account	Selected
1. Knigge DE	✓
2. Knigge AT	✗

- **Who needs a login?**

Creating an individual login for each user who uses Webtrekk regularly is recommended.

Alternatively, more than one person can have access using a generic login (e.g., per department).

- **Advantages and disadvantages of a separate login:**

Advantages	Disadvantages
Individual analysis configuration is possible (which metrics are pre-loaded?).	All individual elements (e.g., reports, custom metrics and formulas) must be approved for other logins.
Individual account configuration (language, default time period, homepage, diagram, row limit, filter view).	Configuration is more elaborate.
Enables customisable configuration of analyses and metrics.	
Security (each user can change his or her personal password at any time).	
Makes precise tracking possible for the history of reports and bookmarks (f.e. when did which user create a report?).	

### Configuration of a user:

- **User name**  
The name is visible, for example, when approving and sharing elements.
- **Login**  
6-30 characters.
- **Validity period**  
After a defined time a user has to change his password.
- **Email**  
Used to quickly send reports and analyses to users.
- **Login has a time limit**  
Used to control duration of the login.
- **Administrative access**  
When this is activated, the user is not subject to any restrictions!

The screenshot shows a user configuration form with the following fields and options:

<b>User name</b>	Demo01
<b>Login</b>	Webtrekk. demo01
<b>Change Password</b>	<input type="checkbox"/> Reset password
<b>Validity period</b>	Unlimited
<b>Email</b>	
<b>Login has a time limit</b>	Yes <input checked="" type="radio"/> No <input type="radio"/>
<b>Login valid until</b>	2014-09-01 <input type="text"/> 01 <input type="text"/> 00
<b>Administrative Access</b>	<input type="checkbox"/> Assign all rights for all accounts to
<b>User Group</b>	Demo-Zugang

The administrator has all rights for all available accounts.

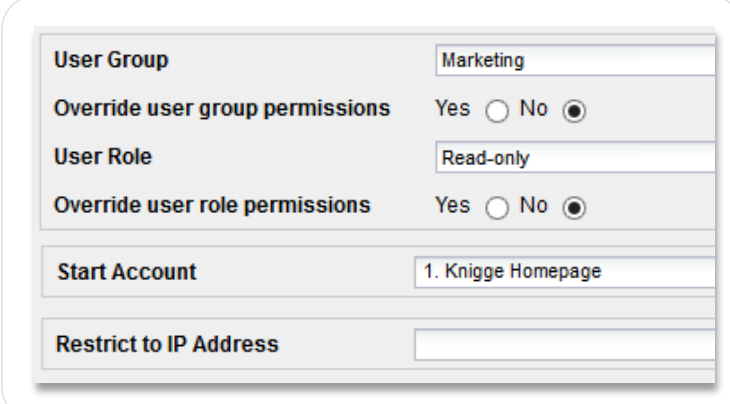
Administrators see all elements created by other users and can change/delete them:

- Reports
- Bookmarks
- Custom metrics/formulas
- Events
- Processes (Funnels)
- Segments
- Campaigns
- Warnings
- Notes

Only the administrator can:

- Create FAQs (that are displayed in the Analysis Wizard)
- Create A/B tests
- Set up website goals

- **User group/user role**  
Stored user groups and user roles can be loaded (see Section 3 and 4).
- **Start account**  
This account is automatically loaded at login.
- **Restrict to IP address:**  
It is possible to restrict access to an IP address or IP range.



The screenshot shows a user configuration form with the following fields and values:

<b>User Group</b>	Marketing
<b>Override user group permissions</b>	Yes <input type="radio"/> No <input checked="" type="radio"/>
<b>User Role</b>	Read-only
<b>Override user role permissions</b>	Yes <input type="radio"/> No <input checked="" type="radio"/>
<b>Start Account</b>	1. Knigge Homepage
<b>Restrict to IP Address</b>	



The user group determines what a user may see per account.

- What is a user permitted to use?

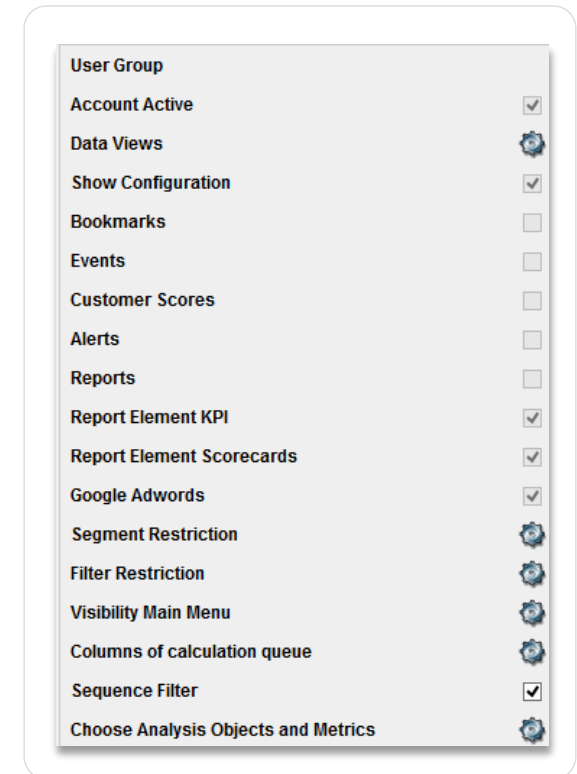
*Example:* A user may read reports.

- What analyses and metrics is the user allowed to see?

- Can the user see all data?

Optional limitation to filters

*Example:* Access via newsletter campaigns only visible for a user group.



Analysis objects and metrics are chosen in a tree view.

- Main nodes (e.g., “Marketing”) are used to quickly select or deselect several elements. After saving, they are NOT activated anymore, but the analysis objects and metrics below them (underlined) still are.



If a user does not have rights for certain analysis objects and metrics, he or she also cannot see if reports, for example, are shared by other users. A notice is shown in the analysis.

The user role determines what a login may work on per account.

*Examples of user roles:*

- **System administrator**  
Master access, no restrictions whatsoever.
- **Professional**  
Creating and editing elements. Not permitted to change any parameters or categories.
- **Beginner**  
Reading rights only.

Various elements can be configured.

*Example of available elements:*

- **System administration**  
The entire system configuration is available. General settings are always possible.
- **User administration**  
Users can be set up and changed. Changing the password is always possible.

Authorizations for the Account	1. Webtrekk Homepage
System Administration	<input checked="" type="checkbox"/>
User Management	<input type="checkbox"/>
SOAP API	<input type="checkbox"/>
Excel Plug-In	<input checked="" type="checkbox"/>
Campaign and Category Import/Export	<input checked="" type="checkbox"/>
Create/Edit Reports	<input type="checkbox"/>
Create/Edit Segments	<input checked="" type="checkbox"/>
Create/Edit Campaigns	<input type="checkbox"/>
Marketing Configuration	<input type="checkbox"/>
Create/Edit Bookmarks	<input type="checkbox"/>
Create/Edit Customer Scores	<input type="checkbox"/>
Create/Edit Alerts	<input type="checkbox"/>
Create/Edit Events	<input type="checkbox"/>
Create/Edit Overlay/Heatmap URLs	<input type="checkbox"/>
Create/Edit Processes	<input type="checkbox"/>
Custom Parameters create/edit	<input type="checkbox"/>
Import the Google Structure	<input type="checkbox"/>
Create/Edit Screenshots	<input type="checkbox"/>
Interfaces	<input type="checkbox"/>
SEO Metrics create/edit	<input type="checkbox"/>
Search Engine Rank create/edit	<input type="checkbox"/>
Search Phrase Potential create/edit	<input type="checkbox"/>
Google AdWords create/edit	<input type="checkbox"/>
Feeds create/edit	<input type="checkbox"/>

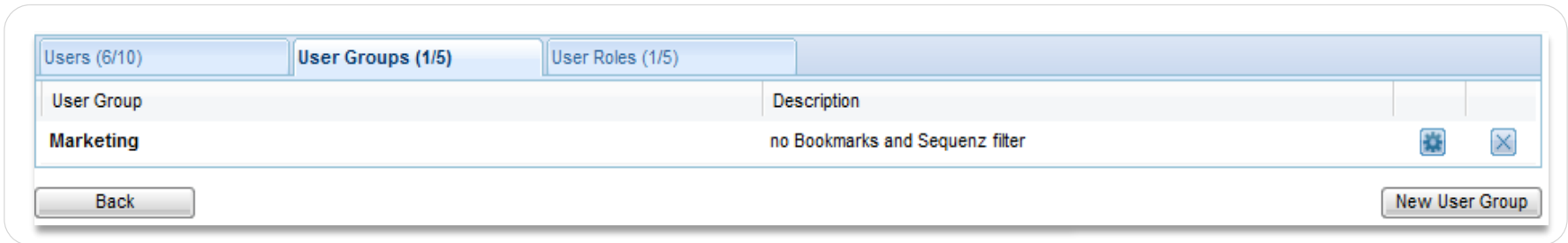


The user role has priority over the user group. If, for example, “Bookmarks” is not activated in the user group, but “Create/edit bookmarks” is approved in the user role, the user can also see the bookmarks.

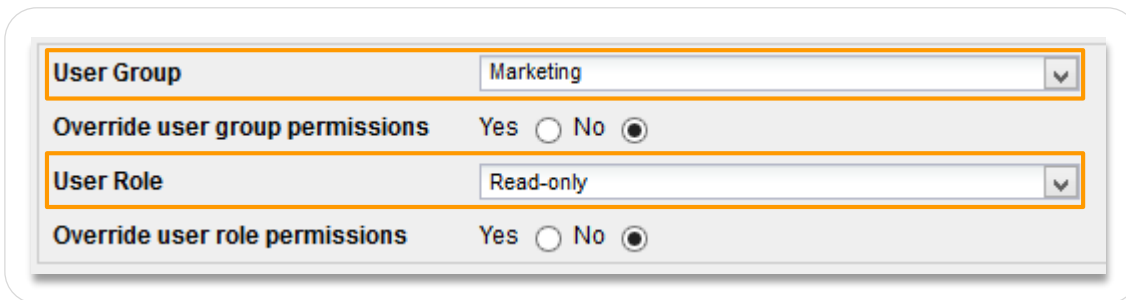
# 5 User group and user role assignment

For fast and convenient administration, user groups and user roles can be stored centrally and loaded per login.

- Define user groups and user roles within the user administration.

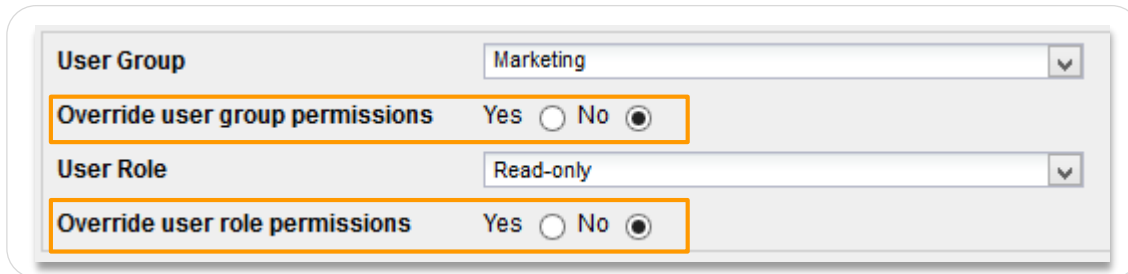


- A user group and user role can be assigned to individual users.



- “Override user group permissions/Override user role permissions”:

The chosen user group or user role is used as a template. However, the settings can be adapted individually for the user.



The screenshot shows a configuration panel with the following elements:

- User Group:** A dropdown menu with 'Marketing' selected.
- Override user group permissions:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- User Role:** A dropdown menu with 'Read-only' selected.
- Override user role permissions:** Radio buttons for 'Yes' and 'No', with 'No' selected.









When user group permissions/user role permissions are skipped, future changes to the user group/user role are not applied to the user.

# 5 User group and user role assignment

Advantages:

- Faster configuration of logins.
- Custom elements (e.g., reports, custom metrics) can also be approved for user groups.  
New users can assume existing rights without great administrative effort.

*Example for clustering users:*

Users (6/10)		User Groups (1/5)	User Roles (1/5)				
Name	Login	User Group	User Role	Active			
Benjamin Richter	knigge.b_richter	Marketing	Read-only	✓			
Dieter Hoffmann	knigge.d_hoffmann	Content-Manager	Edit	✓			

## 6 Approving and sharing elements

A number of elements is saved per user.  
Some of them can be made available to other users.

All users have their own ...	Can be made available to other users?
Reports	
Custom metrics/formulas	
Events	
Processes (Funnels)	
Segments	
Campaigns	
Alerts	
Notes	
Screenshots	
Interface administration	
Bookmarks	
(preconfigured) Analyses	
System configuration (general settings)	
Overlay/Heatmap (URL)	



Webtrekk differentiates between two functions:

- Share (*read rights*): the user can see but not edit the element.
- Direct Access (*read and write rights*): the user can edit and save the element.

*Example:* Approval of reports in the report overview.

Report	Owner	Share	Direct Access
<b>All Reports</b>			
Adwords - Keywords Performance	Super User		
Customer Journey Demo Last Quarter	Super User		
Customer Journeys	Super User		
Customer Lifetime Value Report	Super User		

- Use the “User Administration” button in the overview for the respective elements. Hovering shows the users for whom reports are shared/approved.

- Approval is for users or user groups.

*Example:* "Marketing" is a user group.

**User/User Group Select:**

- All
- Administrator (knigge.master)
- Marketing
  - Benjamin Richter (knigge.b\_richter)
  - Christian Schmidt (knigge.c\_schmidt)

# 7 Deactivating and deleting users

Users can be deactivated and deleted.

The screenshot shows a user management interface with a table of users and a control panel below it. The table has columns for Name, Login, User Group, User Role, and Active. Two users are listed: Benjamin Richter (Marketing, Read-only) and Dieter Hoffmann (Content-Manager, Edit). Both have green checkmarks in the Active column. To the right of each user row are icons for editing, deactivating (a gear with a cross), and deleting (an X). Orange boxes highlight the deactivate and delete icons for both users. Below the table, there is a control panel with an 'Active' label, a radio button for 'Yes' (selected) and 'No', and a 'Delete' button. Orange arrows point from the deactivate icons to the 'No' radio button and from the delete icons to the 'Delete' button.

Name	Login	User Group	User Role	Active			
Benjamin Richter	knigge.b_richter	Marketing	Read-only	✓			
Dieter Hoffmann	knigge.d_hoffmann	Content-Manager	Edit	✓			

Active Yes  No  Delete

- All elements created by users and shared/approved for other logins are retained.
- Please note that reports created by a deactivated or deleted user will no longer be sent out.

This checklist is provided to help you with user configuration.

- All required users set up? Correctly integrated  Error
- Individual rights assigned? Correctly integrated  Error
- User groups applied? Correctly integrated  Error  Not necessary
- User roles applied? Correctly integrated  Error  Not necessary
- Individual default settings per analysis? Correctly integrated  Error  Not necessary
- Rarely used indicators hidden?  
(“Visibility” in system configuration) Correctly integrated  Error  Not necessary
- Restrict login to IP range? Correctly integrated  Error  Not necessary

Thank you for your interest in Webtrekk!

To help us improve the training documentation, we request an evaluation.  
Your feedback assists us with the further optimisation of the training documentation.



Evaluate here!