



# *Webtrekk* **CAMPUS**

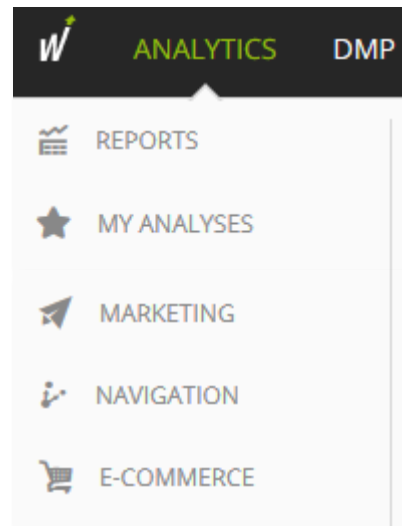
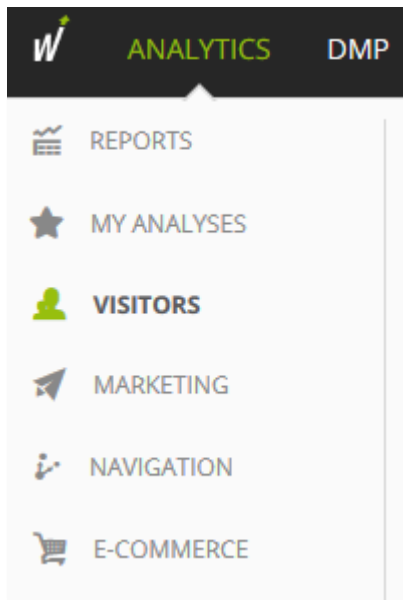
## User Management

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# 1 User Management

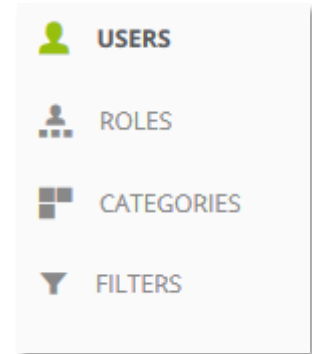
In the User Management it is possible to hide analyses and reports for users.

- The settings only apply for analyses (dimension), but not for metrics.
- Hidden dimensions can still be used for pivot tables or filters though.



For the configuration following can be used:

- **Users:** Which login data?
- **Roles:** Which rights?
- **Categories:** Which reports?
- **Filters:** Should all analyses be filtered as a default?



# 2 Users

Every user should have an own login for Webtrekk. Alternatively it is possible to share a login with several users.

### Individual Webtrekk Login



Login: shop.max\_schustermann

### Shared Webtrekk Login



Login: shop.analyst\_ger

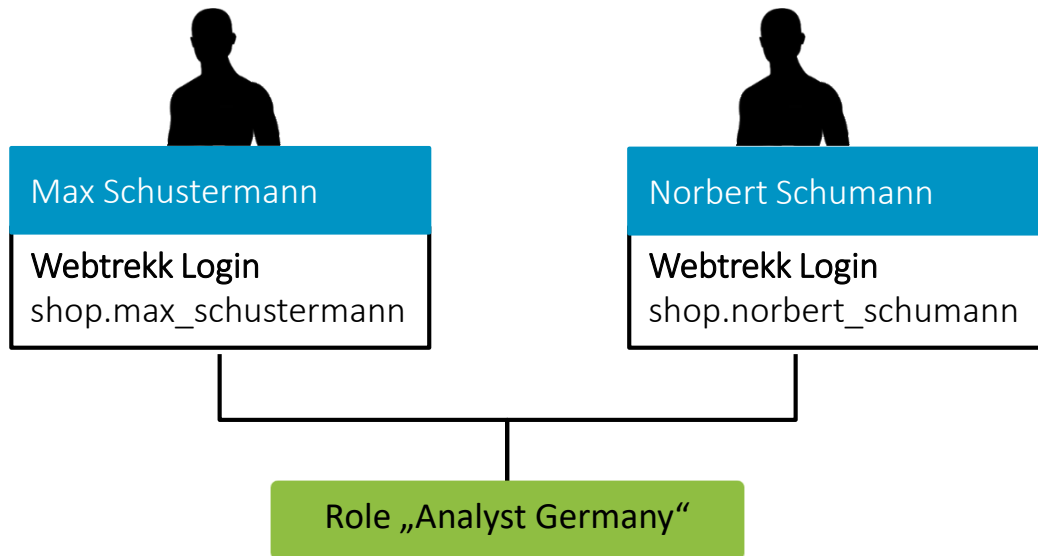
For each login following individual settings can be made:

- Language  
German, English, Chinese
- My Analyses  
Customized analyses that have been saved, which are only available for the certain login.
- Private reports  
All reports, that have not been assigned to a category, are private.
- Change password

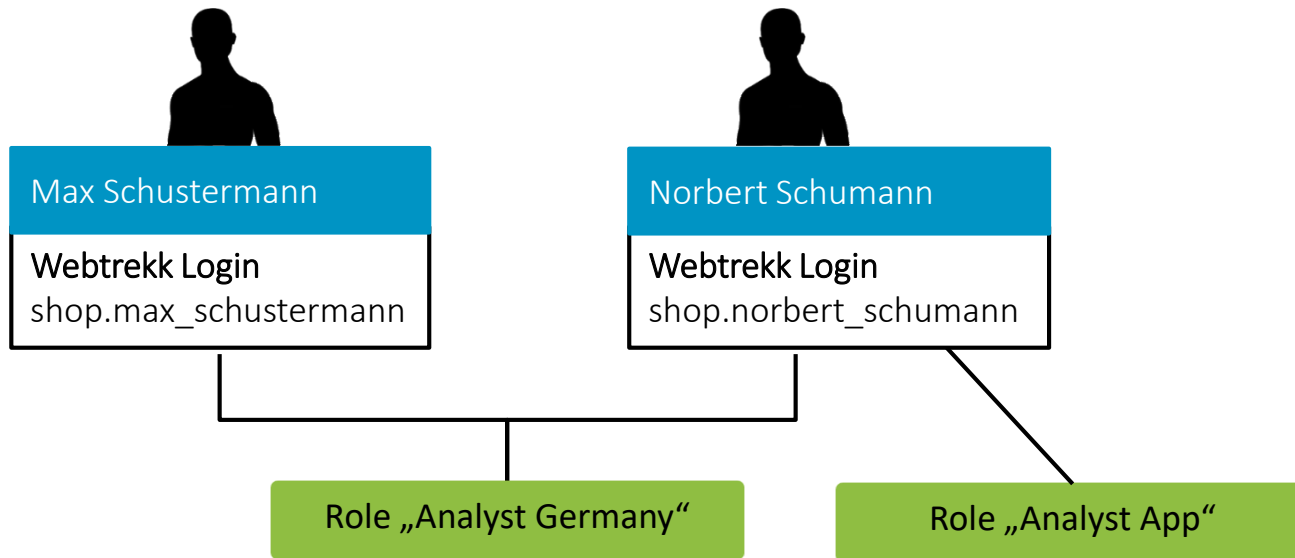
# 3 Roles



For an easier administration User Roles can be determined, which define the rights for each user. Multiple users can belong to one role.

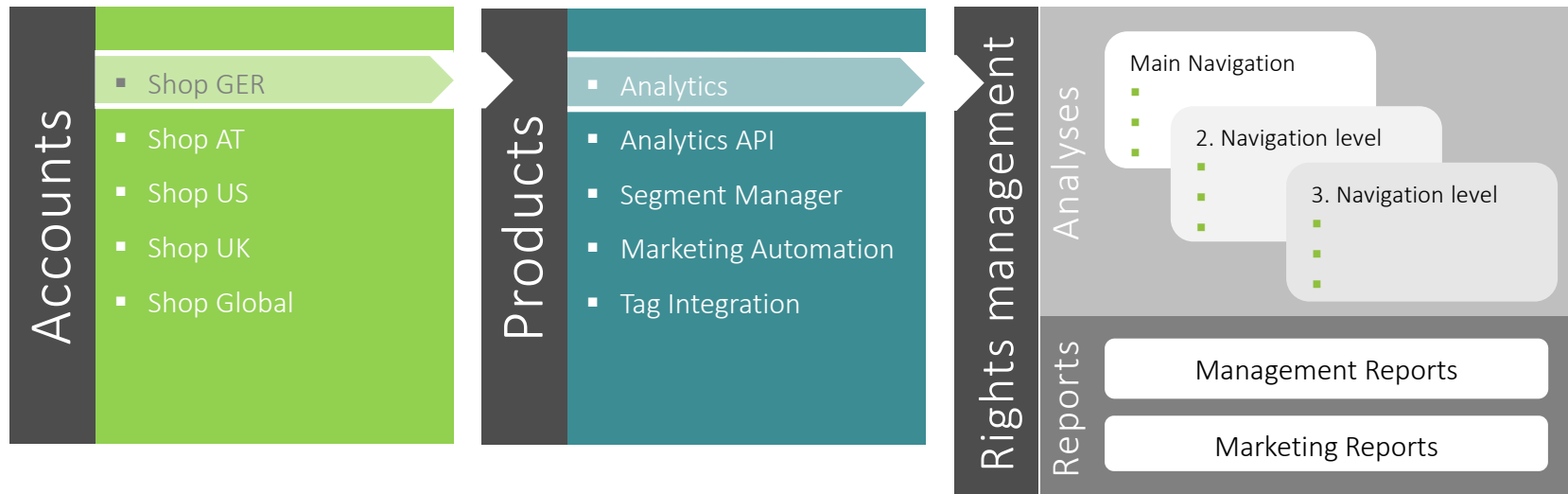


A user can be assigned to multiple roles.



Selectable for each Role are Accounts, Products and Rights for Analyses as well as Report Categories.

Example configuration of a role:



Rights management is only available for Webtrekk Analytics.

# 4 Categories

Categories created in the user management serve to simplify the sharing of reports.

- Through report options every report can be assigned to one or more report categories.

## Reports in the category „Management“

Shop Performance GLOBAL

Shop Performance AT

Shop Performance DE

Shop Performance APP

## Reports in the category „Shop“

Top Products

Flop Products

Summer Sale Products

Shop Performance APP

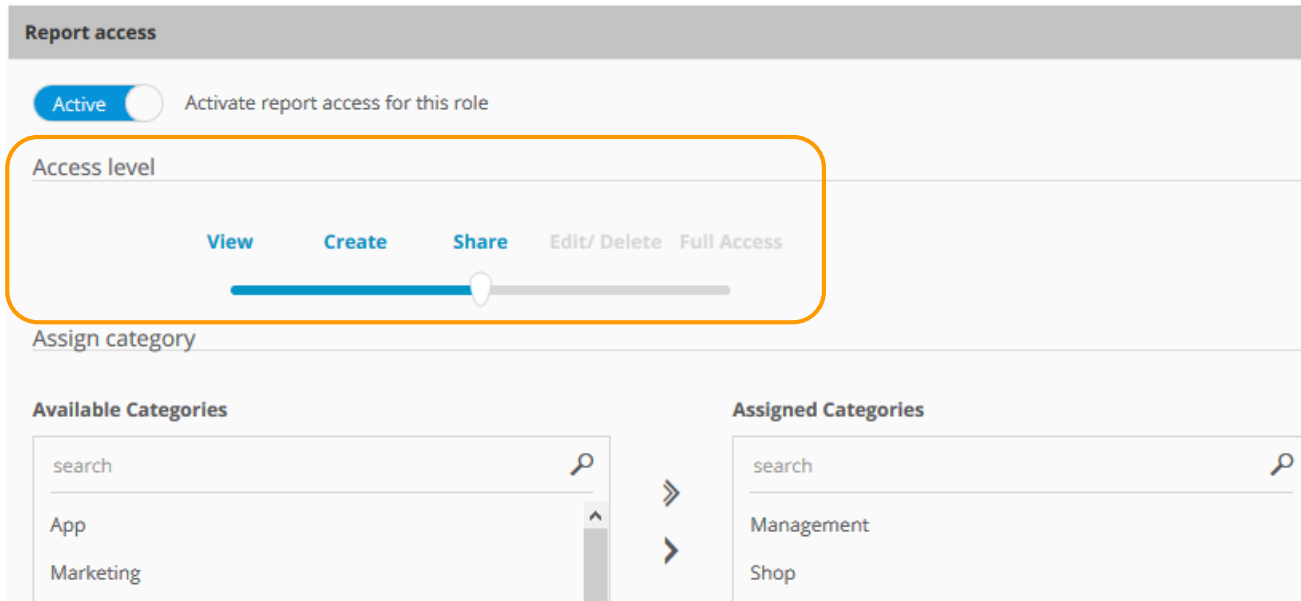
## Private Reports

Test report Max

Top Campaigns from Verena

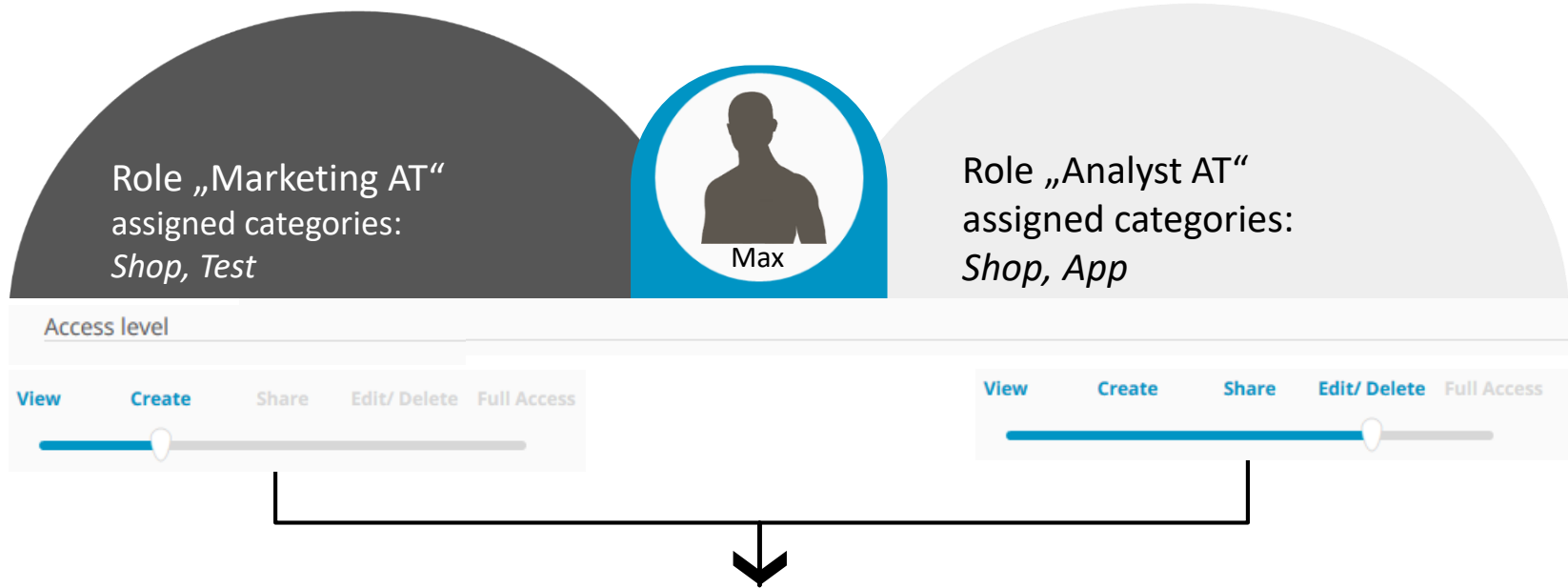
Private reports are only available in the respective login and for users with full access. They have not been assigned to any report category.

For each role the access level for reports can be defined. Further, categories are assigned to each role. The access level applies for all categories that are assigned to a role.



- **View:** Read permission for reports shared with this login
- **Create:** + Creating own reports
- **Share:** + Change report categories
- **Edit/Delete:** + Edit and delete
- **Full Access:** All rights for every report (also private reports!)

When a user is assigned to different roles, for each category the highest of the rights assigned to it is chosen.



For reports from the following categories, the user Max has the following rights:

*Test:*

View Create Share Edit/ Delete Full Access

*Shop, App:*

View Create Share Edit/ Delete Full Access

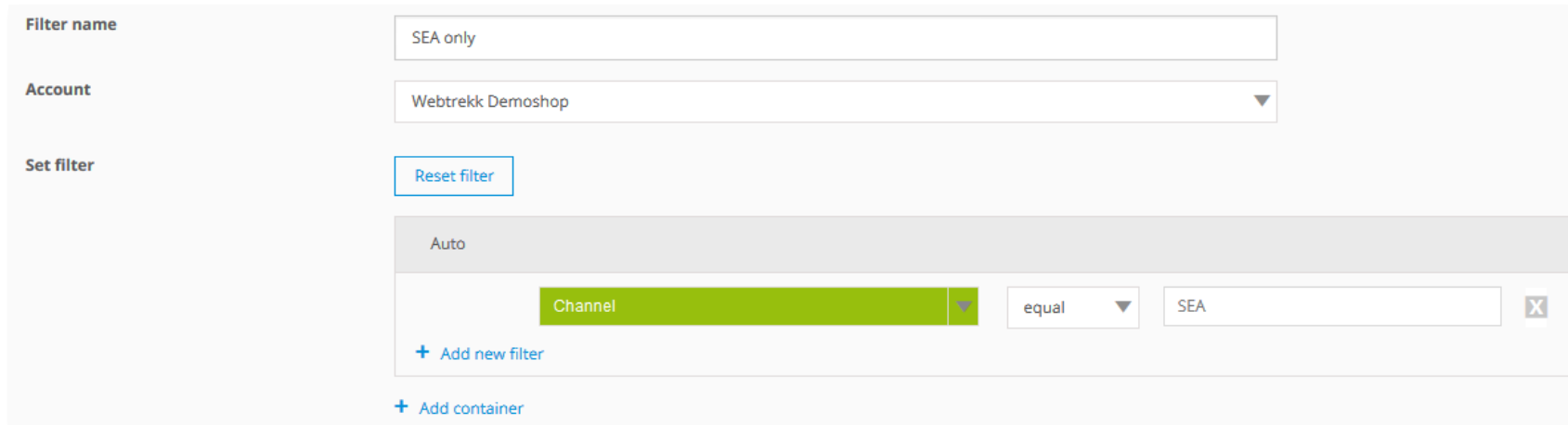
# 5 Filter



Users can be prefiltered, that means that a defined filter will be used permanently on every analysis and report of a selected account.

- A filter can be used per account.
- The entire filter engine is available.

**Example:** All analyses and reports in the account „Webtrekk Demoshop“ will be filtered on the channel SEA.

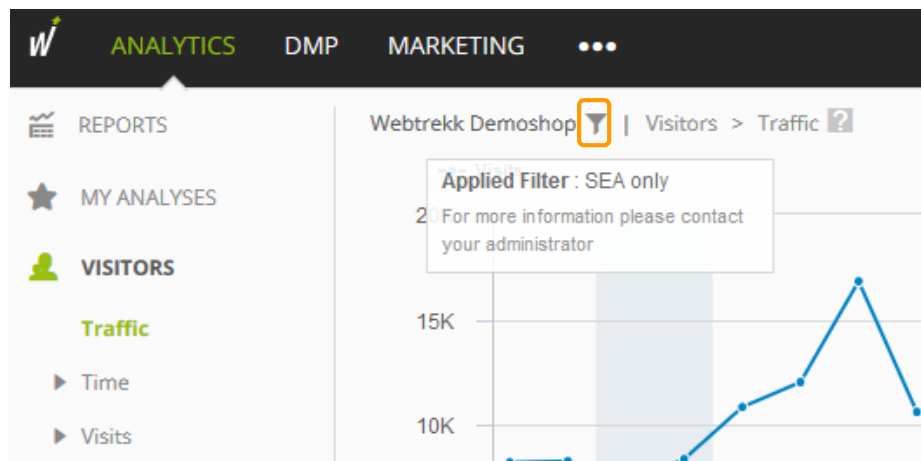


The screenshot shows the Webtrekk filter configuration interface. It includes the following elements:

- Filter name:** A text input field containing "SEA only".
- Account:** A dropdown menu showing "Webtrekk Demoshop".
- Set filter:** A button labeled "Reset filter".
- Filter configuration:** A section titled "Auto" containing a filter rule: "Channel" (highlighted in green) with a dropdown arrow, followed by "equal" (dropdown arrow) and "SEA" (text input field with a clear 'X' button).
- Actions:** Two buttons at the bottom: "+ Add new filter" and "+ Add container".

The filtered users sees a symbol on the analysis path, which indicates the filter.

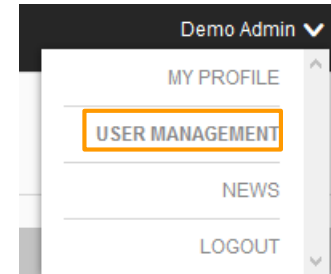
- Per mouseover the name of the applied filter can be shown.



Please note some analyses and elements cannot be filtered; if it is not possible, filtered users get a hint. This affects Google Adwords analyses, Customer Journey analyses and Live Analytics report elements.

# 6 Configuration

Click on the upper right corner on your user name and choose „User Management“.



To establish a complete new setup, the following steps are recommended:

1. Create a Report Category for Webtrekk Analytics („User Management > Categories“)



2. Create a Role („User Management > Roles“) and assign Report Categories to it.



Role „Marketing Germany“

Report Category

- „Marketing“
- „Management“



Role „Marketing Austria“

Report Category

- „Marketing“



Role „Analyst Germany“

Report Category

- „IT“
- „Management“

3. Create a User („User Management > Users“) and assign it to a User Role.



User „Max Schustermann“

Role „Marketing Germany“

Report Category

„Marketing“

„Management“

Role „Marketing Austria“

Report Category

„Marketing“



User „Frank Steinacker“

Role „Analyst Germany“

Report Category

„Management“

„IT“



If you assign a user to several Roles, the rights are being added up.



Max Schustermann

Role „Analyst Austria“

Account: Shop AT

Products: Analytics

Analyses: Full

Report Rights: Share



Report Category  
„Shop“

Max is responsible for the Austrian shop as an analyst. He uses Webtrekk Analytics and has the clearance to see all analyses. He also has the right, to view and share all reports from the category „Shop“.



Max Schustermann

Role „Analyst Austria“

Account:	Shop AT
Products:	Analytics
Analyses:	Full
Report Rights:	Share



Frank Steinacker

Role „Analyst Germany“

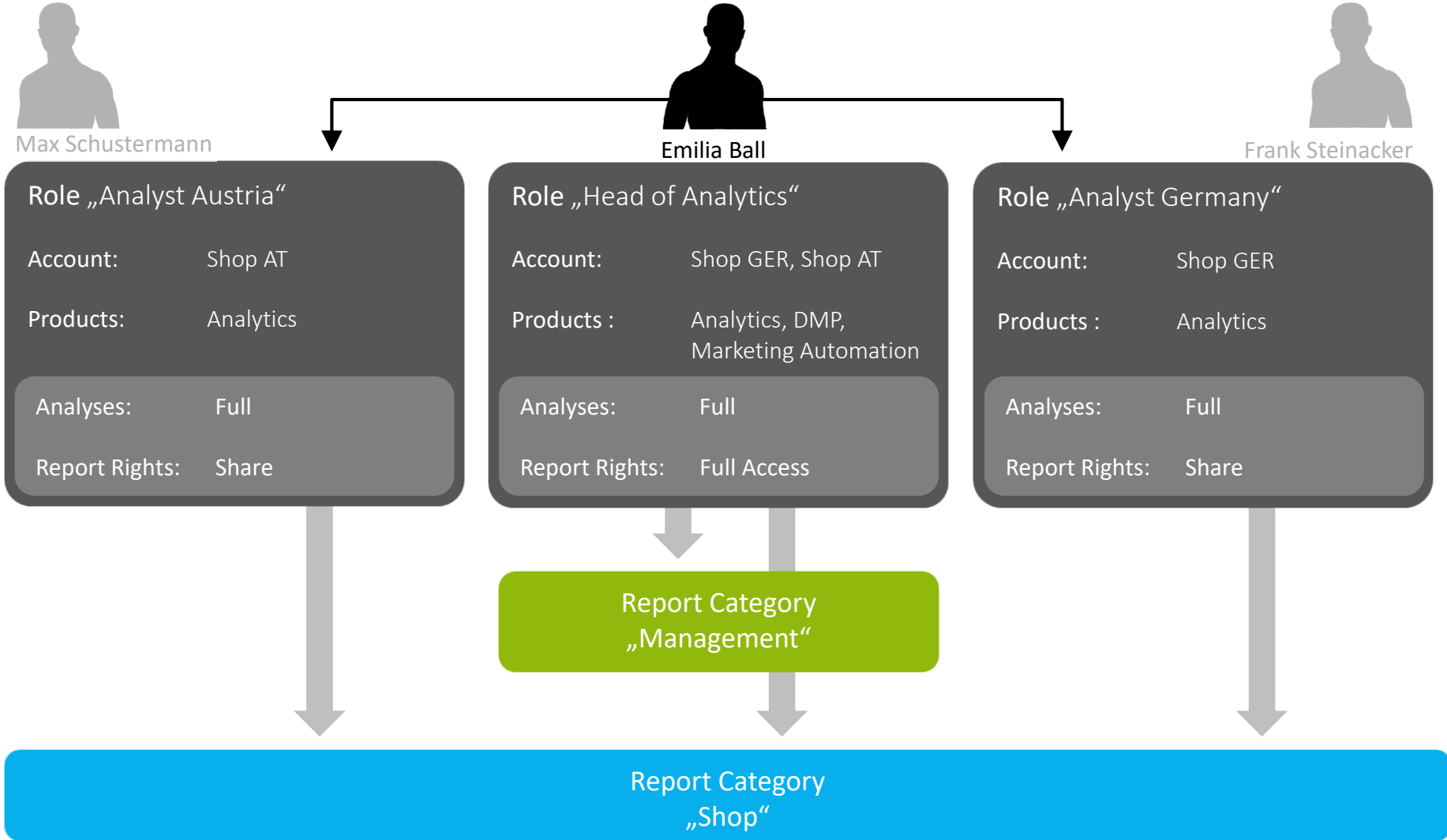
Account:	Shop GER
Products :	Analytics
Analyses:	Full
Report Rights:	Share



Report Category „Shop“

Frank has the same rights, as his Austrian colleague Max, but only sees the German account.

# 6 Configuration



Emilia can use the German, as well as the Austrian account. In addition to Webtrekk Analytics she also has access to Webtrekk DMP and Marketing Automation. She has full access rights on all reports (also on those, who have not been assigned to a category).



You should now be able to answer questions like these:

- What is the purpose of categories in the user management?
- What is the meaning of the access level "Full Access"?

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