Users

The Users section allows you to add and maintain Saber Analytics user accounts.

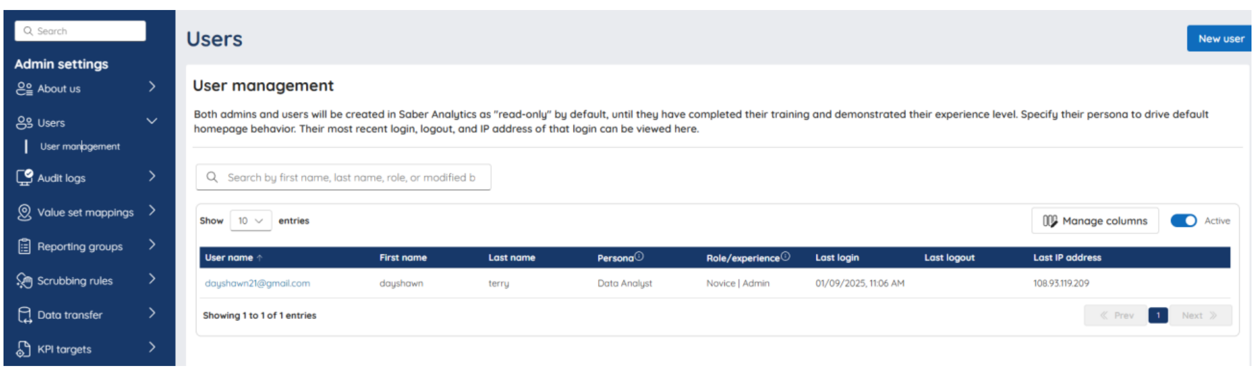
User management

User management allows you to create, edit, and deactivate users. It lets users perform the following actions.

- Search for a user.
- View active or inactive users.
- Create a new user.
- Update or deactivate a user.
- Access to view a user's historical behavior.

To access User management:

1. Login to Saber Analytics. This opens the Saber Analytics landing page.
2. Click the **gear icon**.
3. Click the **Users** Link in the menu, and then click **User management**.



Search for a User

Saber Analytics provides users with multiple ways to search and locate a user.

1. Type the name of the user you're searching for in the **Search** text box. Search by:
    - **First name**
    - **Last name**
    - **Role**
    - **Last modified by**

2. Use the **Active** toggle to show only the active (users being used) or non-active (users not currently in use).

Creating a User

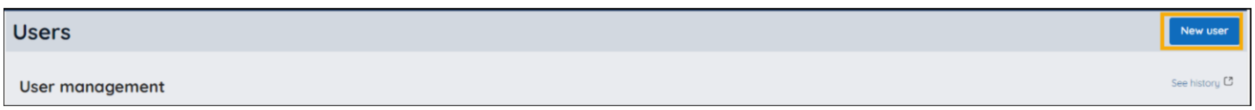
A specific permission drives the ability to create a new user. Not all users can access the New User button and modal.

Important Notes:

- To avoid duplicate users, use the **Search** text box to look for the user ***before*** creating a new account.
- Use the deactivate feature for a misspelled user email address. Then, create a new user account with the correct email address.

Steps to create:

1. Navigate to the **Admin settings.**
2. Click the **Users** Link in the menu, and then click **User management**.
3. Click the **New user** button.



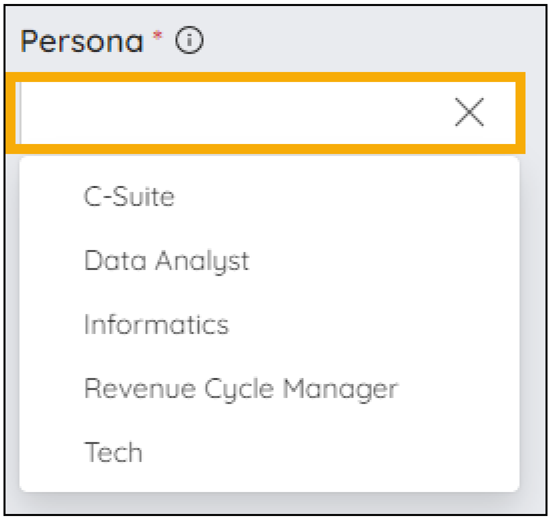
4. Complete the following required user fields. Required fields contain a red *.

   - **First name**
   - **Last name**
   - **Email**: Enter the full email address.

For example, firstname.lastname@companyname.com

5. Click the **Persona text box** to access the menu list and click to select the user's responsibilities (Required).

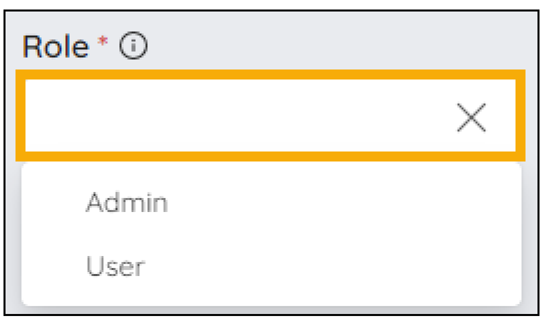
Important Note: The Persona defines the user's role and responsibilities. Choose the persona that best matches the user's job. While the options are not exhaustive, select the closest match. In the future, this will influence the user's default homepage settings



6. Click the **Role text box** to access the user role list and click to select the role (Required).

   - **Admin:** This refers to the user who can manage settings and use the application.
   - **User:** This refers to individuals who can use the application but cannot manage settings.

Note: Refer to the [Information Icon - Hyperlink]() for the access details for each role.



7. Click the **toggle** to indicate if the user access is **Read-only** or **Tech** (Optional).

Important Note: Read-only or Tech access does ***not*** require an Experience Level entry,

skip to step 8.

8. Click the **Experience Level** drop-down to access the menu list and click the user's role experience.

Note: The purpose of assigning an experience level is to ensure that users or admins are granted appropriate levels of permissions within the system. In the future, this experience level designation will be driven by a series of assessments.

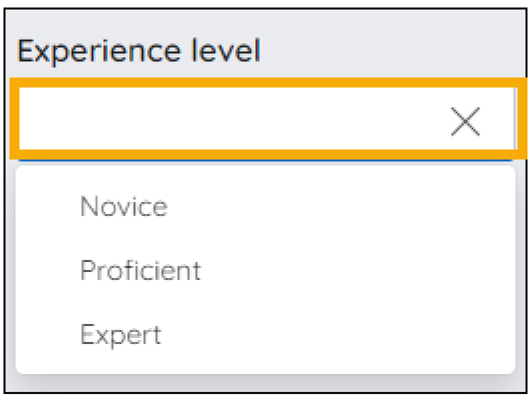
Each role can have additional permissions:

- **Read-only**: Allows viewing without making changes, ideal for new users still in training.
- **Tech**: Designed for IT staff, providing specific capabilities such as user management and data transfer monitoring.

Notes: A user or admin cannot be both "read-only" and "tech" simultaneously. Additionally, if a user is labeled "tech," they will not have an assigned experience level, as the tech role operates independently of this.

Experience Levels (if not read-only or tech):

- **Novice**: Limited permissions for new users.
- **Proficient**: More permissions than novice, suitable for intermediate users.
- **Expert**: Full permissions for highly trained users, allowing them to access all settings



9. Check the checkbox(es) for the **Product Lines** the user can access.

Important Note: Users without a Product Line associated will receive an “Access Restricted” message.

- **Financial Insights**
- **UDS+**

10. Click the **Save and close** button.

The new user will now be displayed in the User Management list.