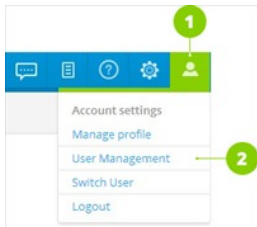


# User Management

User accounts and permissions management for both module and data access allows agency users' access to all the campaign data of a specific advertiser without being responsible or co-responsible for those campaigns.

## Overview Page



In order to access the user management page, click on the **profile icon** (1) in the top menu and choose **User Management** from the drop-down menu (2).

In the overview page, you are able to search for a particular user using the **Search bar** on the right side of the page. The search can be carried out by a full name, login, e-mail, or company.

## Create User

To create a new user, click on the **Create User button** in the overview page. Enter **user information** (1), fill in system **access information** (2), and choose **rights** (3) a new user will obtain. You are also able to enter **Additional information** (4). Once you have finished entering information, press the **Save button**. The created user appears in the list of agency users. If you want to edit an existing user, click on the user's name in the list of agency users and adjust the information.

Only users with admin rights can access the User management section. If this option is not available on your account, contact the Adform Support Team .

### Create User

Basic information

1

Full Name

Phone

Company

optional

2

Email

Login

Password

Re-type Password

3

Assigned Group

DefaultAgencyUsers

☐ Admin Rights

Additional information

4

Title

Mobile

Save

Cancel

### Inactive Users

Click on the **Inactive Users tab** (1) in the secondary horizontal menu in order to access the list of inactive agency users. In this list, you are able to re-activate them. Simply mouse over the name of a user and click on the **Activate icon**(2) once it appears.

Users

Inactive Users

User Groups

Cross-Agency Switching

1

Users

Create User

Search by full name, login, email or company

Full Name	Company	Login Name	User Groups	Campaigns	Admin	Trading Desk
test		test	DefaultAgencyUsers	0	<div>2</div> <input checked="" type="checkbox"/> Activate	

### Details

User

Adform Tutorial

Details

Module Access

Client Access

User Data Access

1

In order to edit user details, click on the name of a user in the list of agency users. Once you are re-directed to a **Details page**(1), you are able to edit the basic information, i.e. user information, system access information, and rights, as well as the advanced information that you have entered when creating a new user.

### Module Access

In the **Module Access** tab(1) you are able to set modules and additional modules' access for a user. Indicate which modules are available to access by selecting the corresponding checkboxes next to them.

Details **Module Access** Client Access User Data Access

1

Base Data	<input checked="" type="checkbox"/> Clients <input checked="" type="checkbox"/> Media	<input checked="" type="checkbox"/> SE accounts <input type="checkbox"/> Template Library
Campaign	<input checked="" type="checkbox"/> MediaPlan <input checked="" type="checkbox"/> New Direct	<input checked="" type="checkbox"/> Tracking <input checked="" type="checkbox"/> Automated Guaranteed
Banners	<input checked="" type="checkbox"/> Overview <input type="checkbox"/> Pause Tags	<input checked="" type="checkbox"/> Tags
Quick Stats	<input checked="" type="checkbox"/> Quick Stats	
Analytics	<input checked="" type="checkbox"/> Analytics Reports: <input checked="" type="radio"/> All <input type="radio"/> Selected(0)	<input type="checkbox"/> Customer Journey
Custom Reports	<input checked="" type="checkbox"/> Generating Reports: <input checked="" type="radio"/> All <input type="radio"/> Selected(0)	<input checked="" type="checkbox"/> Managing
Data Exports	<input type="checkbox"/> Data Exports	<input type="checkbox"/> Export Variables
Real Time Bidding	<input checked="" type="checkbox"/> RTB Setup	User budget limit <input type="text" value="1"/> DKK per day <input type="checkbox"/> Trading Desk Rights <input checked="" type="checkbox"/> Deal Management
Additional services	<input checked="" type="checkbox"/> External API	<input checked="" type="checkbox"/> Reporting Stats API

**Save** Cancel

A user is able to give the access to all or only selected Analytics and Custom Reports' templates which helps restricting or condensing data access for specific users. In order to use this function, click on the **All** or **Selected** radio button (2).

Analytics ☒ Analytics ☐ Customer Journey

Reports: ☐ All ☒ Selected(4) 2

If you click **Selected**, a new window with a list with reports opens. Browse reports and select the ones you want to add to the list.

Select Reports

☒ All Traffic Sources
 ☐ Assisted Conversions
 ☐ Banner Heat Map
 ☐ Campaign Delivery
 ☒ Campaign Geography
 ☒ Campaign In Time
 ☐ Channels
 ☐ Costs

Show selected | Select all

OK

Cancel

## RTB Setup

If you want to enable RTB module, select **RTB Setup** checkbox. Indicate **User budget limit**, a max agency monthly limit. However, User budget limit is used only for the reference and does not actually limit how much can be spent by the user. The currency is inherited from the Agency setup.

Real Time Bidding

☒ RTB Setup

User budget limit

1000000

DKK per day

☐ Trading Desk Rights
 ☐ Deal Management

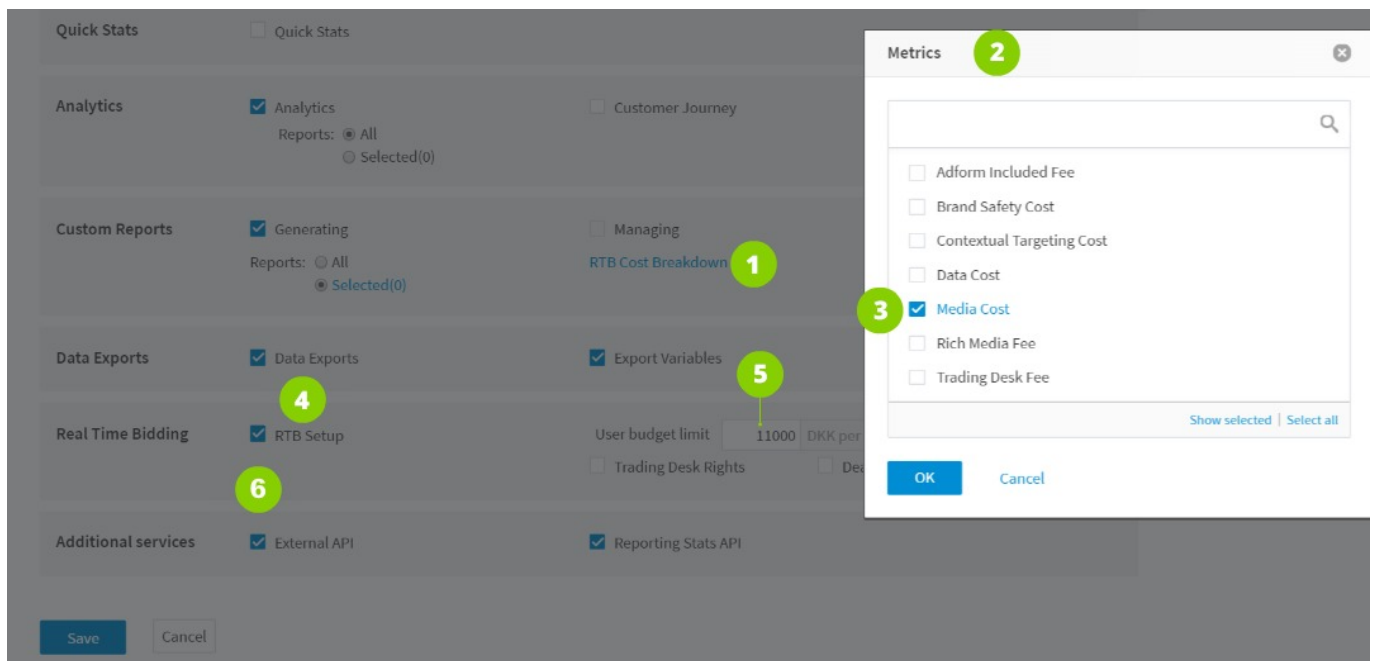
### RTB Cost Breakdown

A user is able to give access to all RTB Cost metrics or only selected ones. In order to use this function, follow the steps below:

Click on the **RTB Cost Breakdown**(1) to open a new window with a list of available metrics.

Browse the list of metrics (2) and select the ones you want to grant access to (3).

If allowing access to the **RTB** (4), the **User Budget limit** (5) has to be indicated. If a user has RTB enabled, **External API**(6) should also be given access in order to create a Mobile Item.



## Password to Access API

Due to security reasons, there are special password complexity requirements for the API access:

- at least 8 characters long
- at least one lowercase character
- at least one uppercase character
- at least one number character
- at least one special character

Once you're done with the settings, click **Save button**.

## Client Access

In the **Client Access tab**(1) you can determine which campaigns a user will be able to access. There are two options available:

**All**(2) - a user is able to access all the campaigns of all the agency's advertisers;

**Selected** (3) - a user is able to access only some certain campaigns. In order to set the access rules, press the **Selected option** (3), then click on the **Add client** icon (4) and choose an agency user from the drop-down list (5). If you would like to give access only to some certain campaigns of that particular user, click the **Selected option** (7) and tick the boxes next to those campaigns in the drop-down list (8). Otherwise, select **All**(6) - a user will then have access to all the campaigns of the selected agency user.

1

DetailsModule AccessClient AccessUser Data Access

23

Access clientsAllSelected

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67

8

4

⊕ Add Client

Tutorial campaign

Social Media Campaign

✓

Tutorial campaign

Tutorial campaign

Show selected | Select all

Save

Cancel