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Users and User Groups

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Creating new user accounts

An administrator can create new user accounts.

About this task

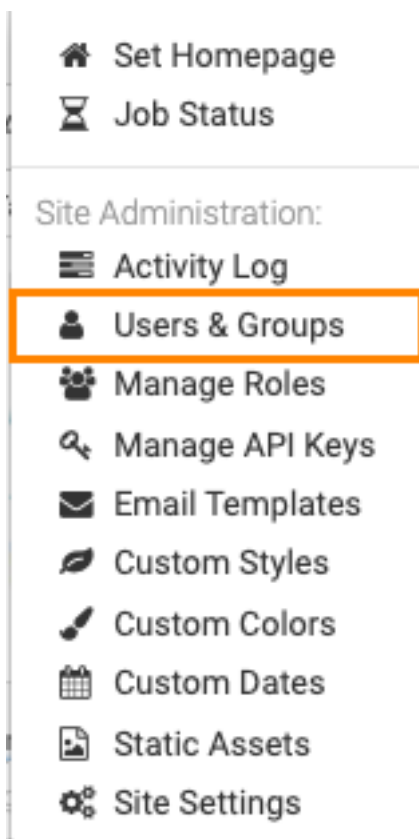


Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to create a new user account:

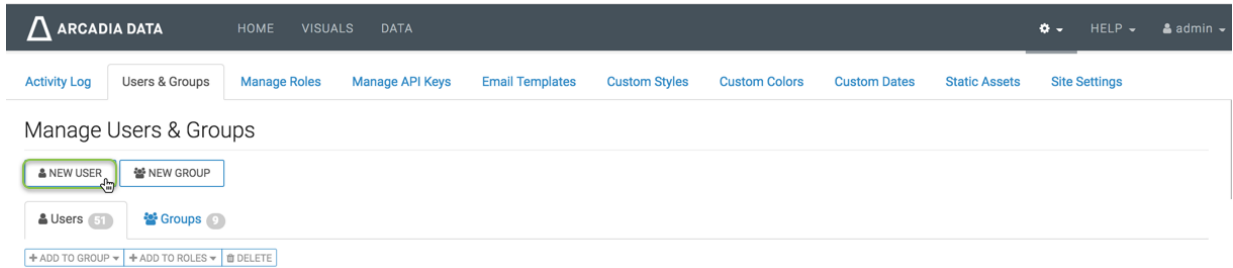
Procedure

1. On the main navigation bar, click the gear icon.
2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. Click New User.



New User modal window appears.

4. In the New User modal window,

- Enter Username. We entered User1.
- Under First Name enter Sara and under Last Name enter Lee. These values can also be picked up from LDAP user definitions.
- Enter Password. We recommend that you consider the following considerations, when you enter your password: Ensure that the password meets the minimum security requirements specified for the instance. See *Setting user password requirements*. After five failed login attempts, locks out the user. To change the account lockout configuration settings or to unlock the user, see *Configuring account lockout*. Check Show Password to copy the password and share it with the designated user.
- Under Permissions, select Normal user.
- [Optional] In the Groups tab, under Group Membership, use the Search box to find user groups, and assign the new user to existing groups by selecting user groups on the left list, and then clicking Add to move them to the right. We added the user to the admin_group group. For further information on how to add users to groups see, *Creating new user groups*.
- [Optional] In the Roles tab, under Roles, use the Search box to find roles, and assign the new user to existing roles by selecting roles on the left list, and then clicking Add to move them to the right. See *Assigning roles to users* for additional information on users and roles.
- [Optional] The Technical User Name option in the New User and Edit User window modals enables the system administrator to specify or edit an alternate name for connection access when using impersonation. Normally, connection access with enabled impersonation delivers the username to the data source. When

using this new mode and configuring the users with a proxy username, the data source receives this proxy username instead. To enable this feature, set the python parameter PROFILE_PROXY_USERNAME to True.

Figure 1: Specifying or Editing the Technical User Name

Edit User
✕

Username

First Name

Last Name

[Change Password](#)

Technical user name

Permissions
☒ **Normal user** - can access Arcadia site
☐ **Admin user** - have all permissions to site

Groups

Roles

☒ **Active** ☐ **Inactive**

Date joined: June 18th 2018
Last login: June 18th 2018

CANCEL

DELETE USER

SAVE 

- Click Save.



Note: If you have not defined at least one User Group, the New User modal window does not contain Group Membership information.

New User



Username

First Name

Last Name

Password

☒ Show Password

Permissions

- ☒ **Normal user** - can access Arcadia site
- ☐ **Admin user** - have all permissions to site

[Groups](#)[Roles](#)

Group Membership



Available to select

Selected

☐ Select All☒ Group1

Results

After the operation succeeds, you can see the Manage Users & Groups page, showing the Users tab. Note that user User1 is part of the list, the account permissions are set to Normal, status is Active, date joined is 11 minutes ago, and last login is Never.

Manage Users & Groups

NEW USER NEW GROUP

Users 3 Groups 1

ADD TO GROUP ADD TO ROLES DELETE

Username (first last)	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	7 months ago	32 minutes ago	Group1	Analyst on connection samples	A
User1 (Sara Lee)	Normal	11 minutes ago	Never	Group1	Analyst on connection samples	A

Note, when User1 logs in, the first name and last name of the user appears in the top right corner of the navigation bar.

ARCADIA DATA HOME VISUALS DATA HELP Sara Lee

After the new user logs in, notice that the date joined changes from 11 minutes ago to 21 minutes ago, and the last login changes from Never to a few seconds ago.

Manage Users & Groups

NEW USER NEW GROUP

Users 3 Groups 1

ADD TO GROUP ADD TO ROLES DELETE

Username (first last)	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	7 months ago	a few seconds ago	Group1	Analyst on connection samples	A
User1 (Sara Lee)	Normal	21 minutes ago	a few seconds ago	Group1	Analyst on connection samples	A

Related Information

[Setting user password requirements](#)

[Configuring account lockout](#)

[Creating new user groups](#)

[Assigning roles to users](#)

Editing accounts

You can change the profile of any user or administrator account in .

About this task



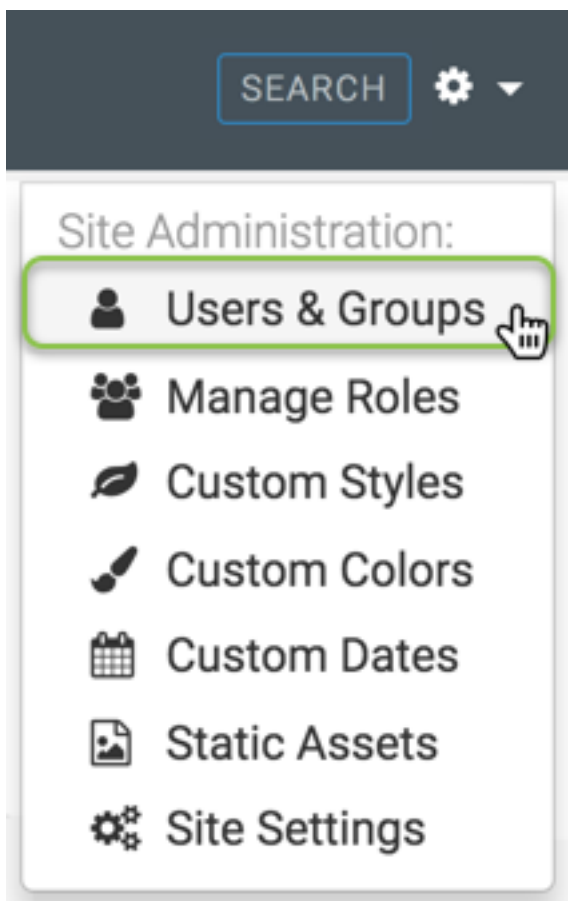
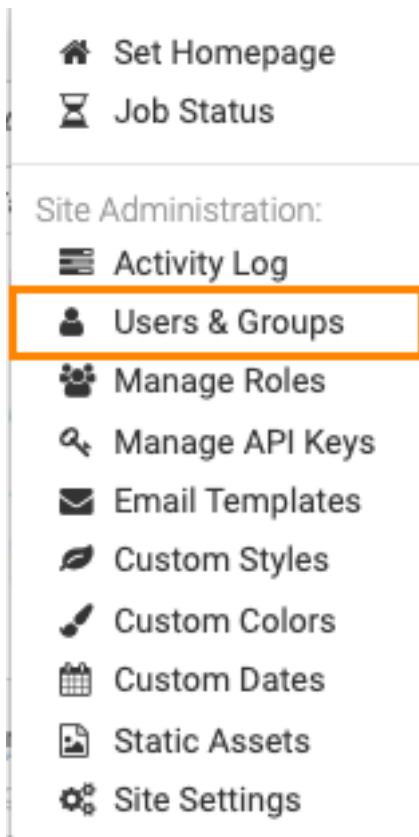
Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to change the username and permissions for an user account; the process is the same for changing the administrative account.

Procedure

1. On the main navigation bar, click the Gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, do one of the following:
 - Click Username, click User1.
 - Click the icon, Pencil icon, that corresponds to that account.

The Edit User modal window appears.

4. In the Edit User modal window, change the following:
 - a) Under Username, change the name from User1 to saralee.
 - b) Under Permissions, click Admin user to change the permissions from a normal user to an admin user.

Edit User ✕

Username

saralee

First Name

Sara

Last Name

Lee

[Change Password](#)

Permissions

- ☐ Normal user - can access Arcadia site
- ☒ Admin user - have all permissions to site

Groups

[Roles](#)

Group Membership

Search



Available to select

ADD >>

<<

Selected

☐ Select All

New group name

+ ADD

☒ Active ☐ Inactive

Date joined: 24 minutes ago

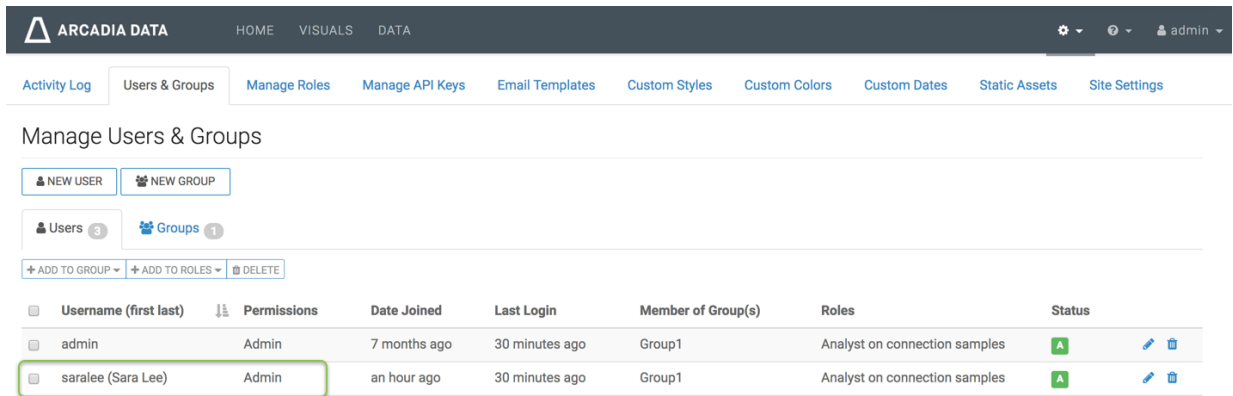
Last login: a few seconds ago

CANCEL

DELETE USER

SAVE

5. Click Save. The Manage Users & Groups page appears. Note that the username of User1 is changed to saralee and this user now has Admin permissions.



The screenshot shows the 'Manage Users & Groups' page in the Arcadia Data interface. The page has a dark header with the Arcadia Data logo and navigation links: HOME, VISUALS, DATA. Below the header is a secondary navigation bar with links: Activity Log, Users & Groups (selected), Manage Roles, Manage API Keys, Email Templates, Custom Styles, Custom Colors, Custom Dates, Static Assets, and Site Settings. The main content area is titled 'Manage Users & Groups' and contains buttons for 'NEW USER' and 'NEW GROUP'. Below these are tabs for 'Users' (3) and 'Groups' (1). There are also buttons for '+ ADD TO GROUP', '+ ADD TO ROLES', and 'DELETE'. A table lists the users:

Username (first last)	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	7 months ago	30 minutes ago	Group1	Analyst on connection samples	
saralee (Sara Lee)	Admin	an hour ago	30 minutes ago	Group1	Analyst on connection samples	

6. [Optional] The Technical User Name option in the New User and Edit User window modals enables the system administrator to specify or edit an alternate name for connection access when using impersonation. Normally, connection access with enabled impersonation delivers the username to the data source. When using this new

mode and configuring the users with a proxy username, the data source receives this proxy username instead. To enable this feature, set the python parameter PROFILE_PROXY_USERNAME to True.

Edit User
×

Username

First Name

Last Name

Change Password

Technical user name

Permissions

☒ **Normal user** - can access Arcadia site
 ☐ **Admin user** - have all permissions to site

Groups

Roles

☒ **Active**
☐ **Inactive**

Date joined: June 18th 2018

Last login: June 18th 2018

CANCEL

DELETE USER

SAVE 

Changing user passwords

An administrator may reset the password of any user, or of another administrator.

About this task

The following steps demonstrate how to change the password for any user account.



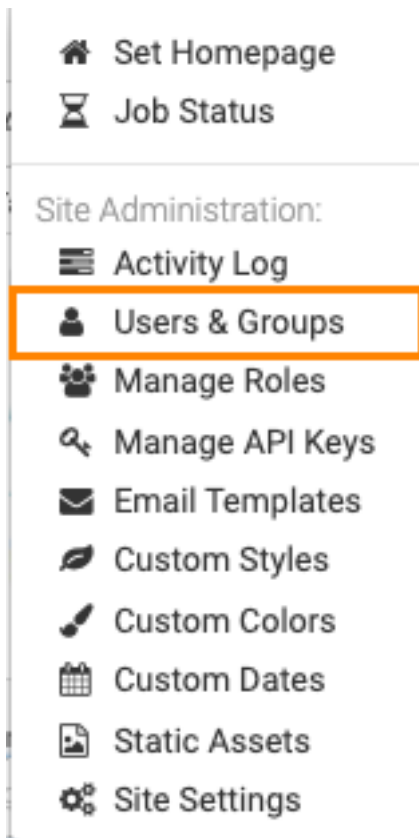
Note: The ‘change password’ option is not available for LDAP and SAML user accounts.

Before you begin

You must have administrative privileges to perform this action.

Procedure

1. On the main navigation bar, click the Gear icon.
2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, do one of the following:
 - Click the Username of the account you want to change.
 - Click the Pencil/Edit icon that corresponds to the account you want to change.

The Edit User modal window appears.

4. In the Edit User modal window, click Change password.

Edit User



Username

TestUser

First Name

John

Last Name

Doe

[Change Password](#)

Permissions

- ☒ **Normal user** - can access Cloudera Data Visualization site
- ☐ **Admin user** - have all permissions to site

Groups

[Roles](#)

Group Membership

Search



Available to select

ADD >>

<<

Selected

☐ Select All☐ viz_guest_group

New group name

+ ADD

☒ **Active**☐ Inactive

Date joined: 18 hours ago

Last login: 18 hours ago

5. Enter the new password.

Consider the following when choosing the password:

- Ensure that the password meets the minimum security requirements specified for the instance. See *Setting user password requirements*.
- After five failed login attempts, locks out the user. To change the account lockout configuration settings or to unlock the user, see *Configuring account lockout*.

You can check the password you have added if you check the Show Password option.

[Hide password](#)

New Password

DataVizNewPassword

☒ Show Password

6. Click SAVE.

Results

The user's password is changed and you get back to the Manage Users & Groups interface.

Related Information

[Setting user password requirements](#)

[Configuring account lockout](#)

Promoting a user to administrator

You can promote any user to an administrator in .

About this task



Note: This feature is only available to users with administrative privileges.

Procedure

1. To promote the user to administrator, open the user account in Edit mode, and change the Permissions by selecting Admin user.

The image displays two side-by-side screenshots of the 'Edit User' form. Both forms have the same layout: Username, First Name, Last Name, Password, and a 'Show Password' checkbox. Below these are tabs for 'Groups' and 'Roles'. The 'Permissions' section is highlighted with a green box in both. In the left screenshot, 'Normal user' is selected. In the right screenshot, 'Admin user' is selected. A green arrow points from the 'Admin user' option in the left screenshot to the 'Admin user' option in the right screenshot. Below the permissions are tabs for 'Groups' and 'Roles', and a 'Group Membership' section with a search bar and a list of available groups.

2. To demote an administrator to user, select Normal User under Permissions.

Creating new administrator accounts

An administrator can create new administrator accounts.

About this task



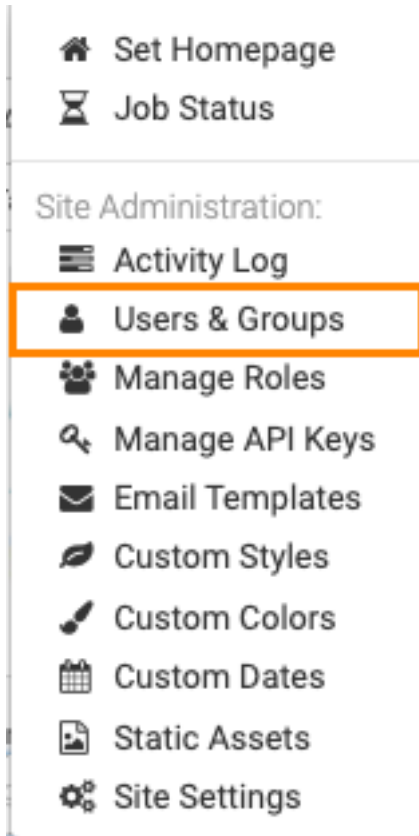
Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to create a new admin account.

Procedure

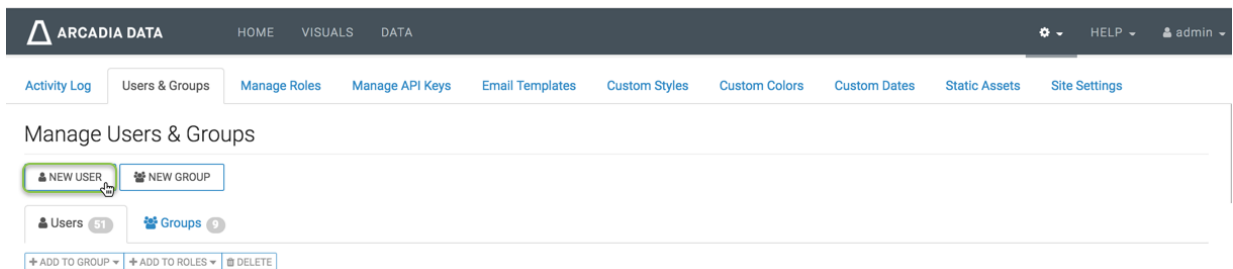
1. On the main navigation bar, click the Gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. Click New User.



The New User modal window appears.

4. In the New User modal window:
 - Enter Username.
 - Enter First Name and Last Name. These values can also be picked up from LDAP user definitions.
 - Enter Password. Consider the following when choosing the password: Ensure that the password meets the minimum security requirements specified for the instance. See *Setting user password requirements*. After five failed login attempts, locks out the user. To change the account lockout configuration settings or to unlock the user, see [Configuring account lockout](#). Check Show Password to copy the password and share it with the designated user.
 - Under Permissions, select Admin user.
 - [Optional] In the Groups tab, under Group Membership, use the Search box to find user groups, and assign the new user to existing groups by selecting user groups on the left list, and then clicking Add to move them to the

right. For more information on adding users to groups, see additional information on adding users to *Adding users to user groups*.

- [Optional] In the Roles tab, under Roles, use the Search box to find roles, and assign the new user to existing roles by selecting roles on the left list, and then clicking Add to move them to the right. See additional information on adding users to [roles](#).
- Click Save.



Note: If you have not defined at least one User Group, the New User modal window does not contain Group Membership information.

Figure 2: New Admin User Setup

The screenshot displays the 'Manage Users & Groups' page in the Arcadia Data interface. The page has a dark header with the Arcadia Data logo and navigation links (HOME, VISUALS, DATA). Below the header is a navigation bar with tabs: Activity Log, Users & Groups (selected), Manage Roles, Manage API Keys, Email Templates, Custom Styles, and Custom Colors. Under the 'Users & Groups' tab, there are sub-tabs: Custom Dates, Static Assets, and Site Settings. The main content area is titled 'Manage Users & Groups' and contains buttons for 'NEW USER' and 'NEW GROUP'. Below these are tabs for 'Users' (51) and 'Groups' (9). There are also buttons for '+ ADD TO GROUP', '+ ADD TO ROLES', and 'DELETE'. The main table lists users with the following columns: Username (first last), Permissions, Date Joined, Last Login, Member of Group(s), Roles, and Status. Two users are listed: 'admin' and 'admin1 (Sara Lee)'. The 'admin1' user is highlighted with a green box around the 'Date Joined' and 'Last Login' columns, showing '19 minutes ago' and '5 minutes ago' respectively.

☐	Username (first last)	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐	admin	Admin	7 months ago	a few seconds ago			A
☐	admin1 (Sara Lee)	Normal	19 minutes ago	5 minutes ago	admin_group		A

Results

After the operation succeeds, you will see the Manage Users & Groups page, open on the Users tab. Note that the user ArcadiaAdmin is part of the list, the account permissions are set to Admin, and status is Active.

Figure 3: Manage Users & Groups, List of Users with New Admin User

ARCADIA DATA HOME VISUALS DATA SEARCH admin

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

NEW USER NEW GROUP

Users 4 Groups 3

+ ADD TO GROUP + ADD TO ROLES DELETE

☐	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐	admin	Admin	2 years ago	a year ago		everything	
☐	Administrator	Admin	a year ago	9 days ago		everything	
☐	ArcadiaAdmin	Admin	a few seconds ago	a few seconds ago			
☐	ArcadiaUser	Normal	30 minutes ago	30 minutes ago			

Related Information

[Setting user password requirements](#)

[Creating new user groups](#)

Inactivating user accounts

It is sometimes necessary to inactivate a user's account without removing it from the system.

About this task



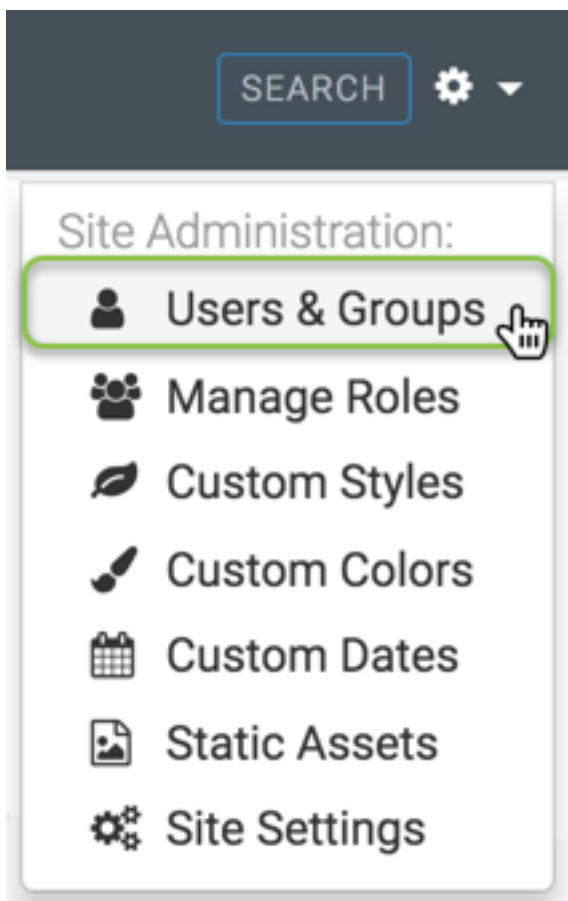
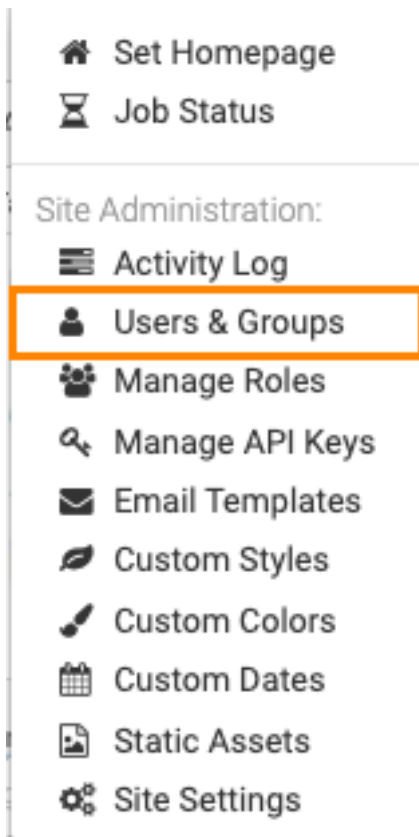
Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to inactivate an user account.

Procedure

1. On the main navigation bar, click the Gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of Users, click either the Username of the account you want to inactivate, or the edit, Pencil, icon.

4. In the Edit User modal window, select Inactive.

Edit User



Username

ArcadiaUser

First Name

enter first name

Last Name

enter last name

[Change password](#)

Permissions

- ☒ **Normal user** - can access Arcadia site
- ☐ **Admin user** - have all permissions to site

Groups

[Roles](#)[Homepage](#)

Group Membership

Search



Available to select

- ☐ **Select All**
- ☐ Arcadians
- ☐ Group One
- ☐ SalesReps
- ☐ TestGrp

ADD >>

<<

Selected

Select options from the left

New group name

+ ADD

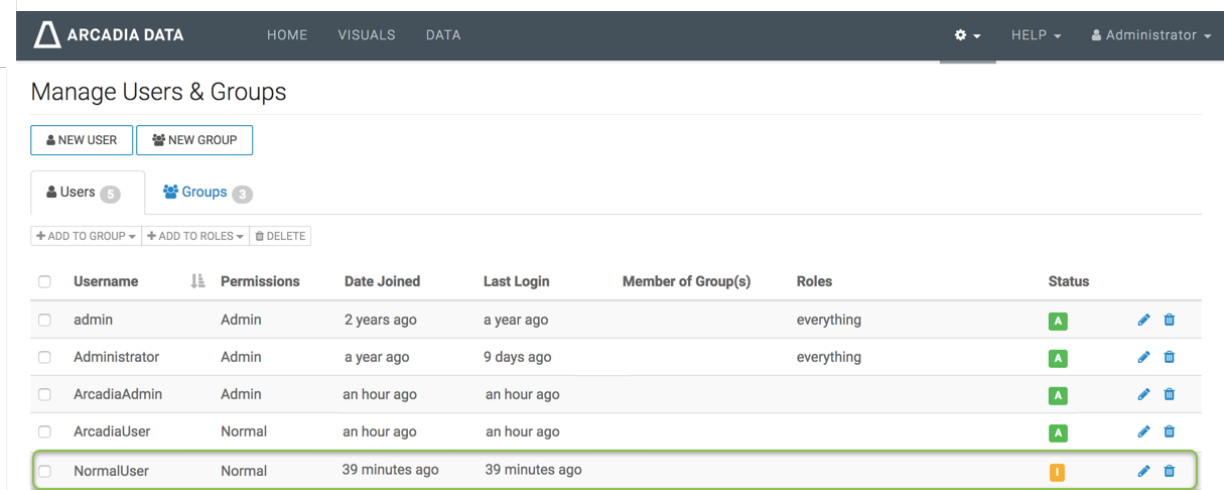
☐ **Active**☒ **Inactive**

Date joined: September 6th 2017

Last login: September 6th 2017

5. Click Save.
6. After the operation succeeds, you will see the Users screen.

Note that the inactive user is part of the list, and the status is set to Inactive.



The screenshot shows the 'Manage Users & Groups' page in the Arcadia Data application. At the top, there are navigation links for HOME, VISUALS, and DATA, along with a user profile dropdown for 'Administrator'. Below the navigation bar, there are buttons for 'NEW USER' and 'NEW GROUP'. A tab bar shows 'Users' (5) and 'Groups' (3). Below the tab bar, there are buttons for '+ ADD TO GROUP', '+ ADD TO ROLES', and 'DELETE'. The main table lists users with the following data:

☐	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐	admin	Admin	2 years ago	a year ago		everything	A
☐	Administrator	Admin	a year ago	9 days ago		everything	A
☐	ArcadiaAdmin	Admin	an hour ago	an hour ago			A
☐	ArcadiaUser	Normal	an hour ago	an hour ago			A
☐	NormalUser	Normal	39 minutes ago	39 minutes ago			I

Assigning roles to users

An administrator can assign users to roles in one of these several ways:

- [Assigning roles to a single user](#) on page 28
- [Assigning roles to multiple users](#) on page 36
- [Assigning multiple roles to multiple users](#) on page 41



Note: This feature is only available to users with administrative privileges.

Assigning roles to a single user

About this task

In this article, we demonstrate how to add security roles to a user's profile.

Follow these steps:

Procedure

1. On the main navigation bar, click the gear icon.

2. In the drop-down menu, click Users & Groups.

Figure 4: Selecting Users & Groups from Site Administration Menu

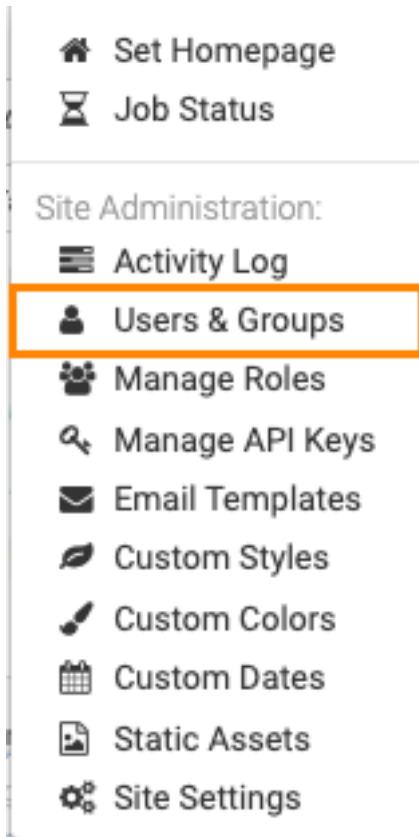
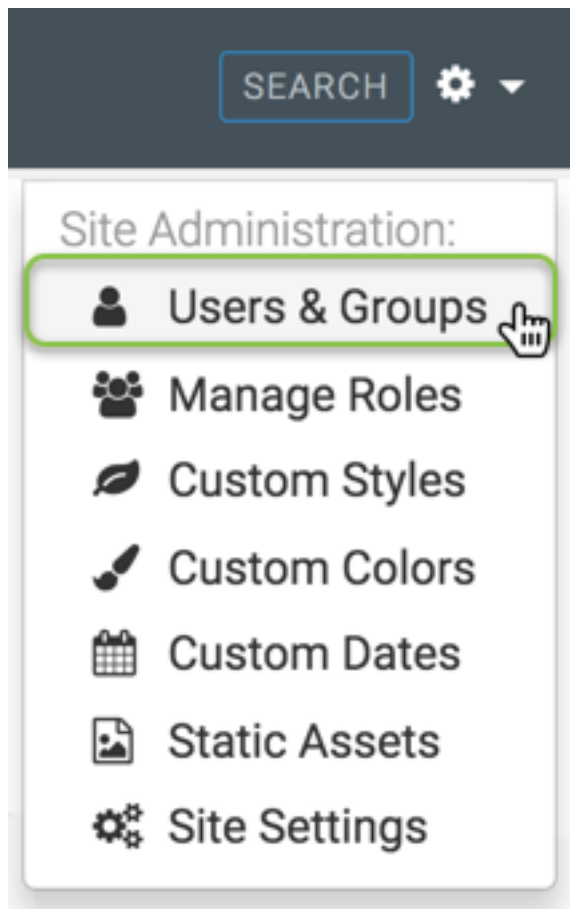


Figure 5: Selecting Users & Groups from Site Administration Menu



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, select the user where you plan to assign new roles, and do one of the following:
 - Click the Username of the account you want to change.
 - Click the edit icon, that corresponds to that account.

ARCADIA DATA HOME VISUALS DATA

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

Users 11 Groups 4

+ ADD TO GROUP + ADD TO ROLES DELETE

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status	
admin	Admin	2 years ago	a year ago	Administrators		A	
Administrator	Admin	a year ago	20 days ago	Administrators		A	
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators		A	
ArcadiaUser	Normal	2 years ago	7 months ago			A	
CArep1	Normal	a year ago	a year ago	SalesReps	View Only	A	
CArep2	Normal	a year ago	a year ago	SalesReps	View Only	A	
NormalUser	Normal	2 months ago	2 months ago			I	
NVrep1	Normal	a year ago	a year ago	SalesReps	View Only	A	
ORrep1	Normal	a year ago	a year ago	SalesReps	View Only	A	
SimpleUser	Normal	7 months ago	7 months ago			A	
WArep1	Normal	a year ago	a year ago	SalesReps	View Only	A	

Showing 1 to 11 of 11 entries

4. The Edit User modal window appears.
5. In the Edit User modal window, click the Roles tab.

6. Select a new role to assign to the user (we used Test Role 1), and click Add.

Edit User



Username

ArcadiaUser

First Name

enter first name

Last Name

enter last name

[Change Password](#)

Permissions

- ☒ **Normal user** - can access Arcadia site
- ☐ **Admin user** - have all permissions to site

[Groups](#)

Roles

Roles

Search



Available to select

- ☐ **Select All**
- ☐ **View Only**
- ☐ **Administrators Only**
- ☒ **Test Role 1**

ADD >>

<<

Selected

Select options from the left

- ☒ **Active** ☐ **Inactive**

Date joined: July 7th 2015

Last login: April 5th 2017

CANCEL

DELETE USER

SAVE

7. After the desired role or roles appear on the right side of the interface, click Save.

Edit User ✕

Username

First Name

Last Name

[Change Password](#)

Permissions

- ☒ **Normal user** - can access Arcadia site
- ☐ **Admin user** - have all permissions to site

[Groups](#)[Roles](#)

Roles



Available to select

- ☐ **Select All**
- ☐ **Administrators Only**
- ☐ **View Only**

ADD >>

<<

Selected

- ☐ **Select All**
- ☐ **Test Role 1**

☒ **Active** ☐ **Inactive**

Date joined: July 7th 2015

Last login: April 5th 2017

[CANCEL](#)[DELETE USER](#)[SAVE !\[\]\(742490d1213b0ca3beace65d71c76205_img.jpg\)](#)

Results

Note that in the Users & Groups interface, the user now has the Test Role 1 role assignment.

The screenshot shows the 'Manage Users & Groups' interface in Arcadia Data. The 'Users' tab is selected, showing a list of 11 users. The user 'ArcadiaUser' is highlighted with a green box, and their role is 'Test Role 1'.

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	a year ago	Administrators		A
Administrator	Admin	a year ago	20 days ago	Administrators		A
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators		A
ArcadiaUser	Normal	2 years ago	7 months ago	Group One	Test Role 1	A
CArep1	Normal	a year ago	a year ago	SalesReps	View Only	A
CArep2	Normal	a year ago	a year ago	SalesReps	View Only	A
NormalUser	Normal	2 months ago	2 months ago			I
NVrep1	Normal	a year ago	a year ago	SalesReps	View Only	A
ORrep1	Normal	a year ago	a year ago	SalesReps	View Only	A
SimpleUser	Normal	7 months ago	7 months ago			A
WArep1	Normal	a year ago	a year ago	SalesReps	View Only	A

Showing 1 to 11 of 11 entries

Assigning roles to multiple users

About this task

In this article, we demonstrate how to add users to a role. We are using an existing role Test Role 1.

To assign users to existing roles, follow these steps:

Procedure

1. Under the Members tab, in the Users list, click Edit User(s)

The screenshot shows the 'Members' tab in the Arcadia Data interface. The 'Users' section is active, showing a list of users. The 'EDIT USER(S)' button is highlighted with a green box.

☒ Privileges ☒ Members

Users 0 **EDIT USER(S)** Groups 0 ☐ Require all groups **EDIT GROUP(S)**

Username First Name Last Name Group Name

(these users were explicitly added and are not necessarily part of the added groups)

2. The Role Assignment modal window for users appears.

Role Assignment

Members

Search

Available to select

☐ Select All

☐ Administrator

☐ ArcadiaAdmin

☐ ArcadiaUser

☐ CArep1

☐ CArep2

☐ NVrep1

☐ NormalUser

☐ ORrep1

ADD >>

<<

Selected

Select users from the left to add to the role's members

Enter new user name

+ ADD

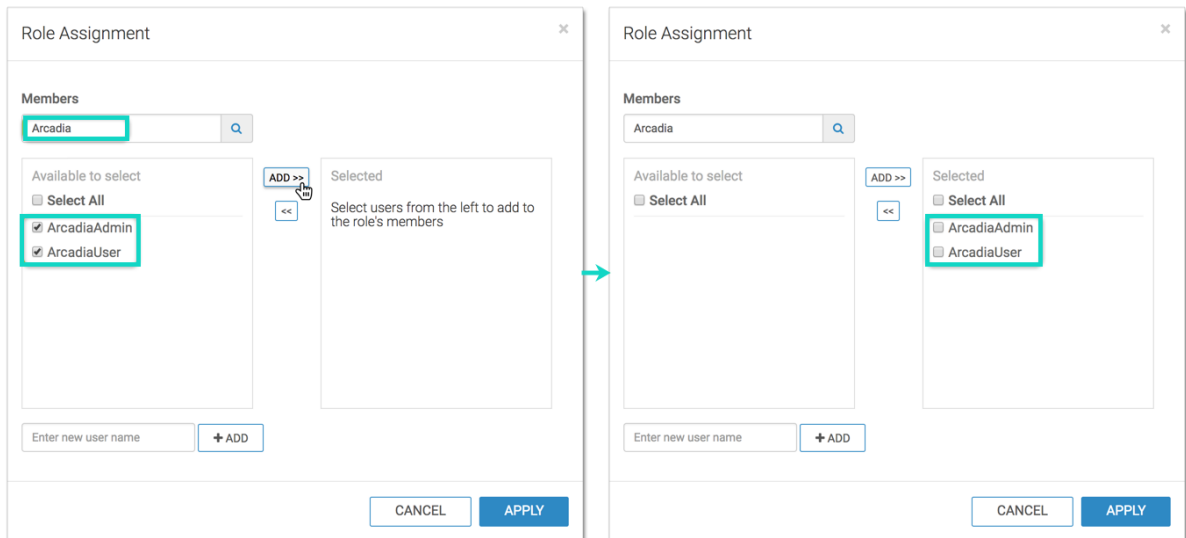
CANCEL

APPLY

3. There are several options for adding a user to a membership:

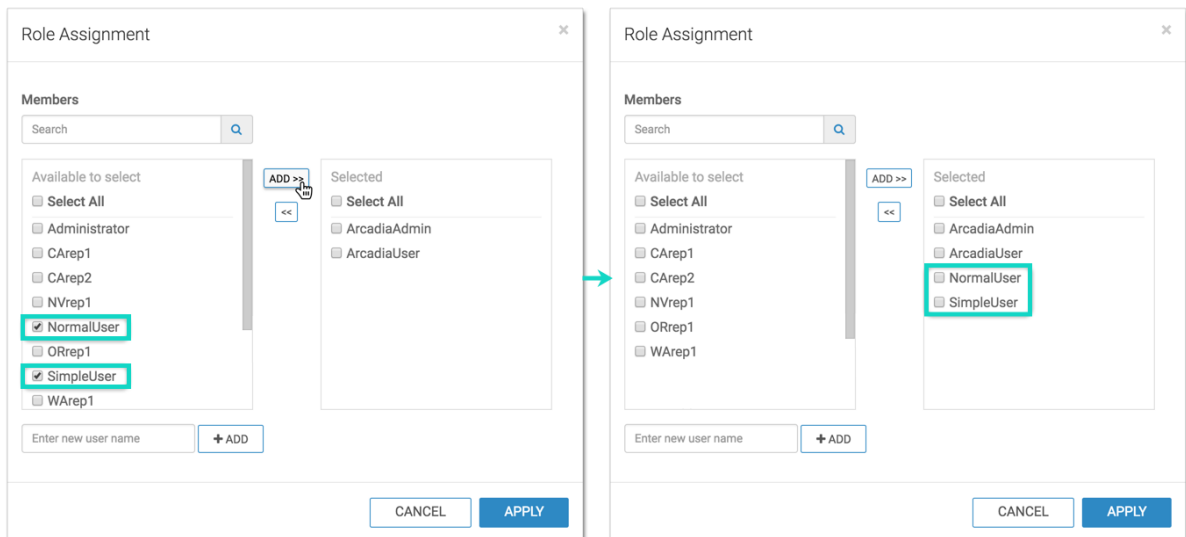
- *Search*

If you have a long list of users in the Members section, use the Search box to match user names, select them from the sub-list, and then click Add to move them to the right side of the modal window. Click Apply.



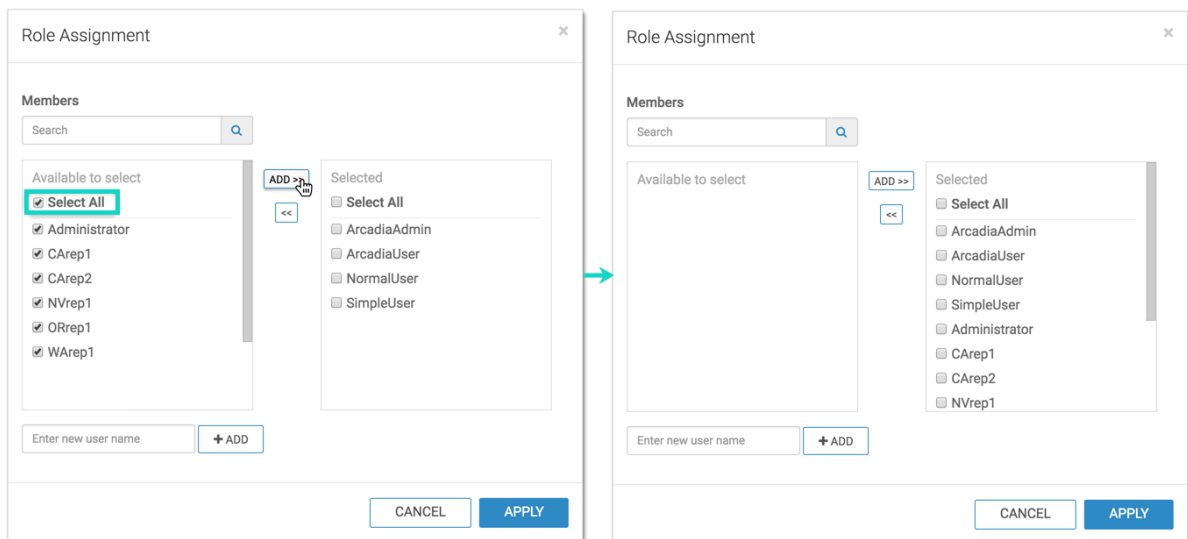
- *Select*

In the Members section, select the users to assign to the role and click Add to move them to the right side of the modal window. Click Apply.



- *Select All*

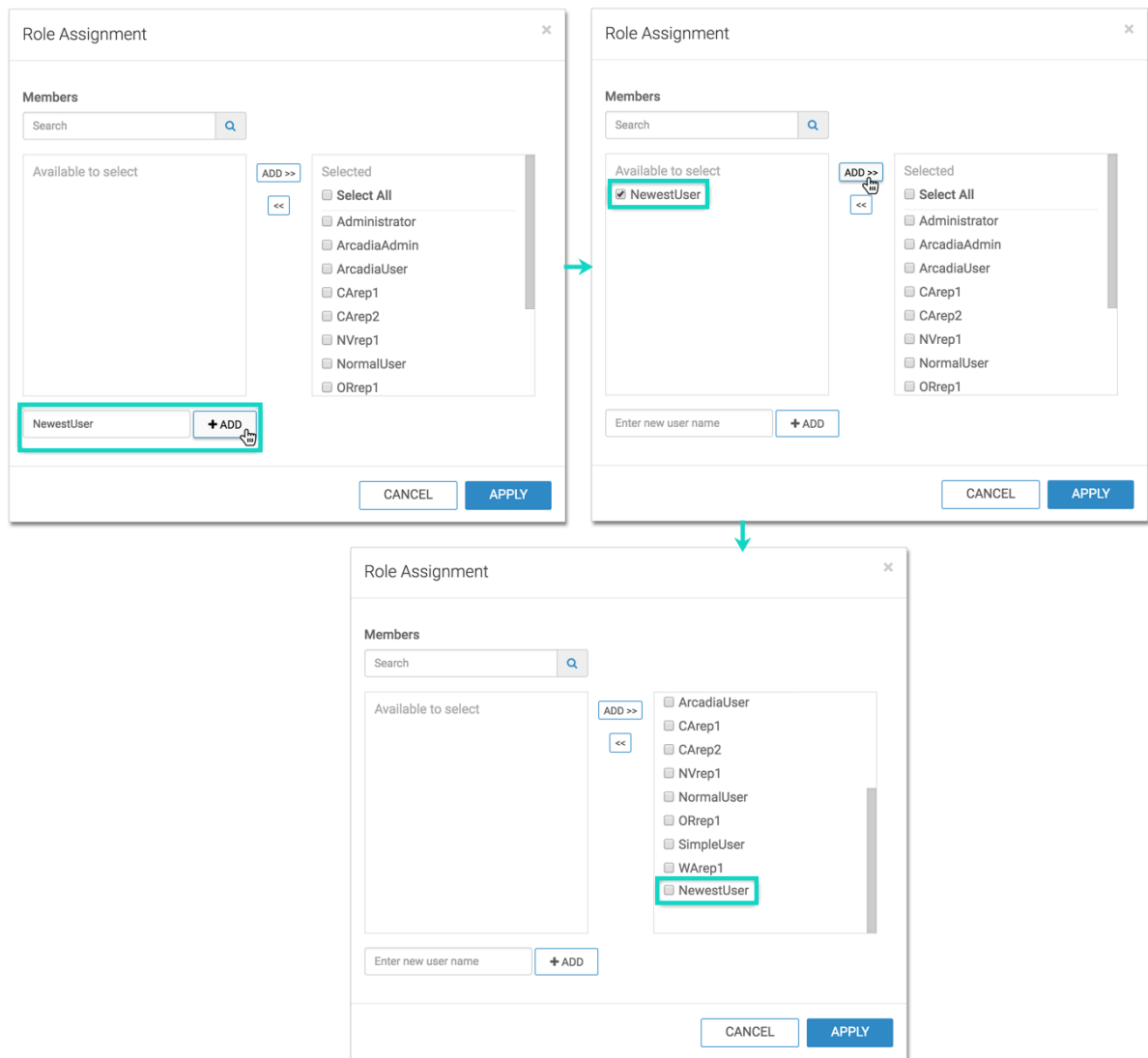
To assign all users to Members, select All to get all user names, and then click Add to move them to the right side of the modal window. Click Apply.



- *Adding Externally Defined Users; LDAP Authentication*

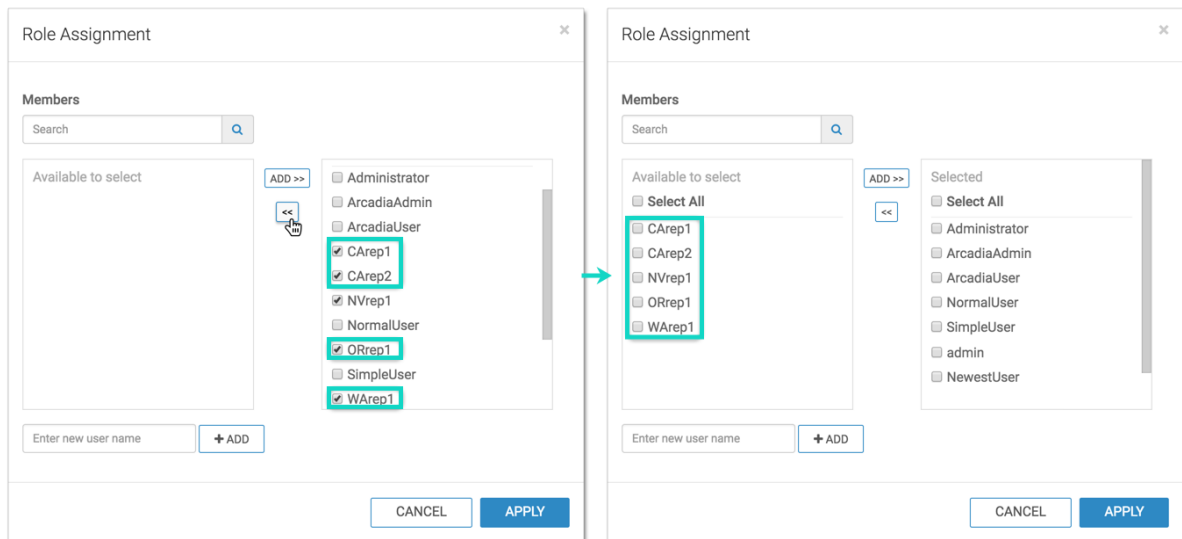
For convenience, the Role Assignment interface supports adding into the list of assignees usernames that are not stored locally. For example, known usernames available through LDAP authentication may be added in this manner.

Enter the new user name, and click Add. After the new user name appears in the Members section, select it and click Add to move the new user to the right side of the modal window. Click Apply.



- **Remove**

To move users out of Members, select the user(s) on the right side panel, and then click the Left Arrow. Click Apply.



The list of users assigned to the role appears in the Role: Test Role 1 interface, under the Members tab.

4. Click Save. A confirmation of role update appears briefly on the screen.

ARCADIA DATA HOME VISUALS DATA ⚙️ HELP Administrator

Roles / Role Detail

Role: Test Role 1

SAVE UNDO

Name Test Role 1

Description Testing role creation

☒ Privileges ☐ Members

Users 7 EDIT USER(S)

Username	First Name	Last Name
NewestUser		
Administrator		
ArcadiaAdmin		
ArcadiaUser		
NormalUser		
SimpleUser		
admin		

(these users were explicitly added and are not necessarily part of the added groups)

Groups 0 ☐ Require all groups EDIT GROUP(S)

Group Name

Assigning multiple roles to multiple users

About this task

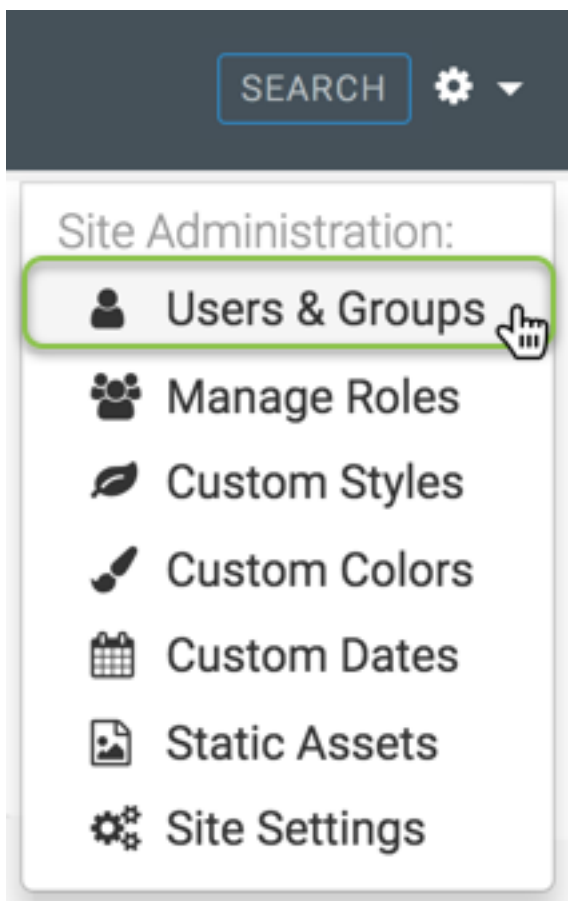
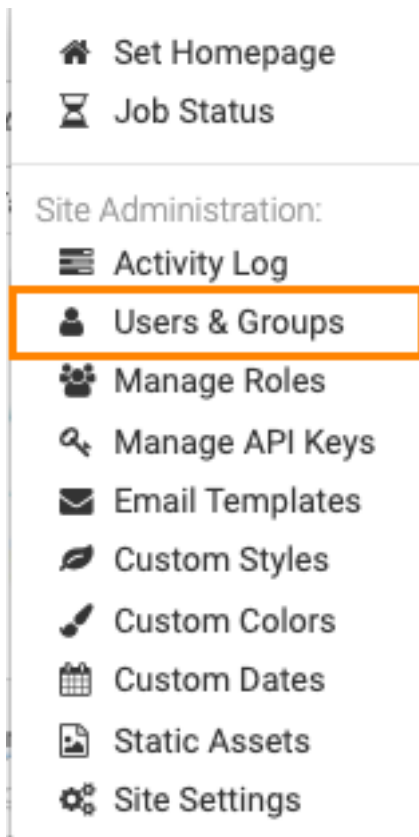
In this article, we demonstrate how to add multiple users to multiple roles in the Users interface. We are using existing roles Test Role 1 and View Only.

To assign multiple users to existing roles, follow these steps:

Procedure

1. On the main navigation bar, click the gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. Select the users that you want to assign to roles. We used CArep1, CArep2, NVrep1, ORrep1, and WAre1.

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

NEW USER NEW GROUP

Users 11 Groups 4

+ ADD TO GROUP + ADD TO ROLES DELETE

☐	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status	
☐	admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A	edit delete
☒	CArep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☒	CArep2	Normal	a year ago	a year ago	SalesReps		A	edit delete
☐	NormalUser	Normal	2 months ago	2 months ago		Test Role 1	!	edit delete
☒	NVrep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☒	ORrep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☐	SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A	edit delete
☒	WAre1	Normal	a year ago	a year ago	SalesReps		A	edit delete

Showing 1 to 11 of 11 entries

4. Click Add to Roles.

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

NEW USER NEW GROUP

Users 11 Groups 4

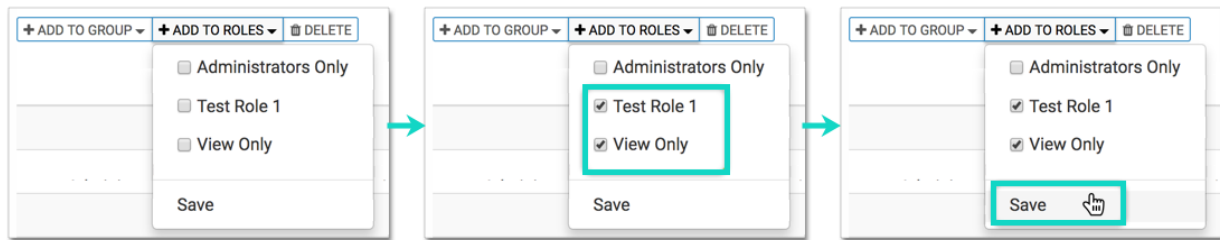
+ ADD TO GROUP + ADD TO ROLES DELETE

☐	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status	
☐	admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A	edit delete
☐	ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A	edit delete
☒	CArep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☒	CArep2	Normal	a year ago	a year ago	SalesReps		A	edit delete
☐	NormalUser	Normal	2 months ago	2 months ago		Test Role 1	!	edit delete
☒	NVrep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☒	ORrep1	Normal	a year ago	a year ago	SalesReps		A	edit delete
☐	SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A	edit delete
☒	WAre1	Normal	a year ago	a year ago	SalesReps		A	edit delete

Showing 1 to 11 of 11 entries

5. In the drop-down menu, select the roles you plan to assign to the selected users, and click Save.

We used the roles Test Role 1 and View Only.



Results

Note the changes to the information in the Users interface.

ARCADIA DATA HOME VISUALS DATA SEARCH admin

Activity Log Users & Groups Manage Roles Manage API Keys Email Templates Custom Styles Custom Colors Custom Dates Static Assets Site Settings

Manage Users & Groups

NEW USER NEW GROUP

Users 11 Groups 4

+ ADD TO GROUP + ADD TO ROLES DELETE

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	a year ago	Administrators	Test Role 1, Administrators Only	A
Administrator	Admin	a year ago	20 days ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaAdmin	Admin	2 months ago	2 months ago	Administrators	Test Role 1, Administrators Only	A
ArcadiaUser	Normal	2 years ago	7 months ago		Test Role 1	A
CArep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
CArep2	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
NormalUser	Normal	2 months ago	2 months ago		Test Role 1	I
NVrep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
ORrep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A
SimpleUser	Normal	7 months ago	7 months ago		Test Role 1	A
WArep1	Normal	a year ago	a year ago	SalesReps	Test Role 1, View Only	A

Showing 1 to 11 of 11 entries

Deleting user accounts

An administrator can delete both standard user accounts, and administrator accounts, in one of the following ways:

- [Deleting individual user accounts](#) on page 45
- [Deleting several user accounts](#) on page 51



Note: This feature is only available to users with administrative privileges.

Deleting individual user accounts

About this task

The following steps demonstrate how to delete an individual user account.

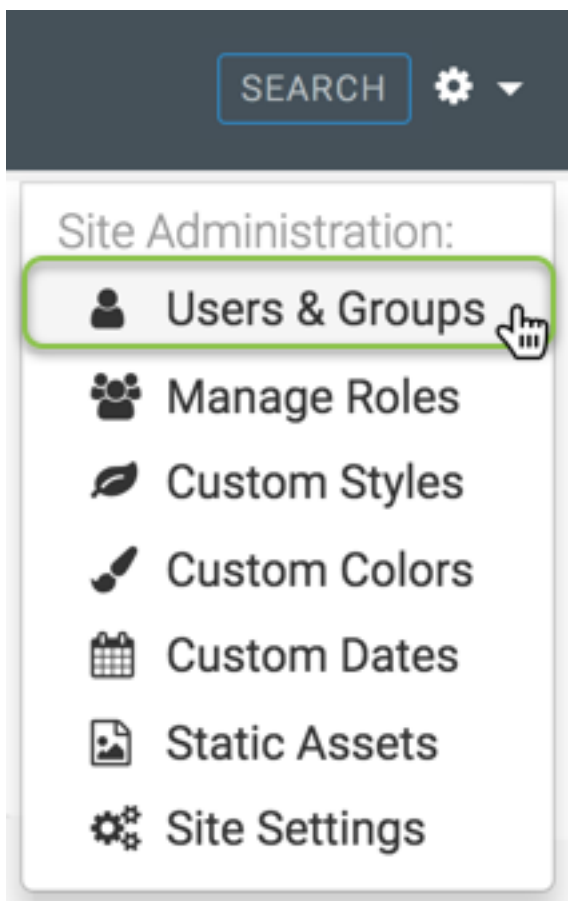
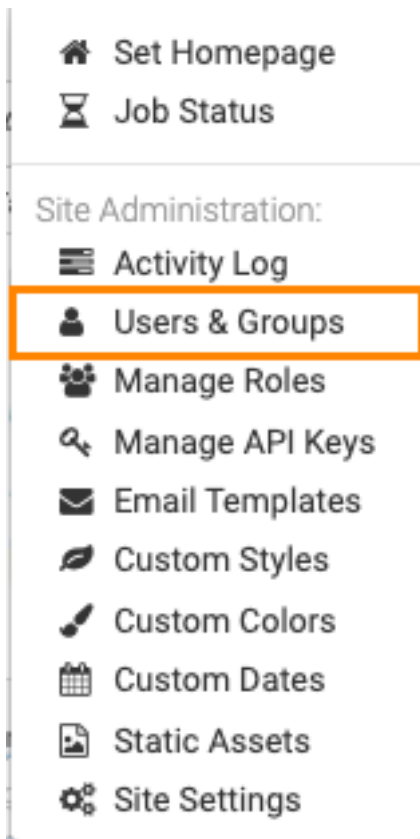


Note: This feature is only available to users with administrative privileges.

Procedure

1. On the main navigation bar, click the Gear, the gear icon.

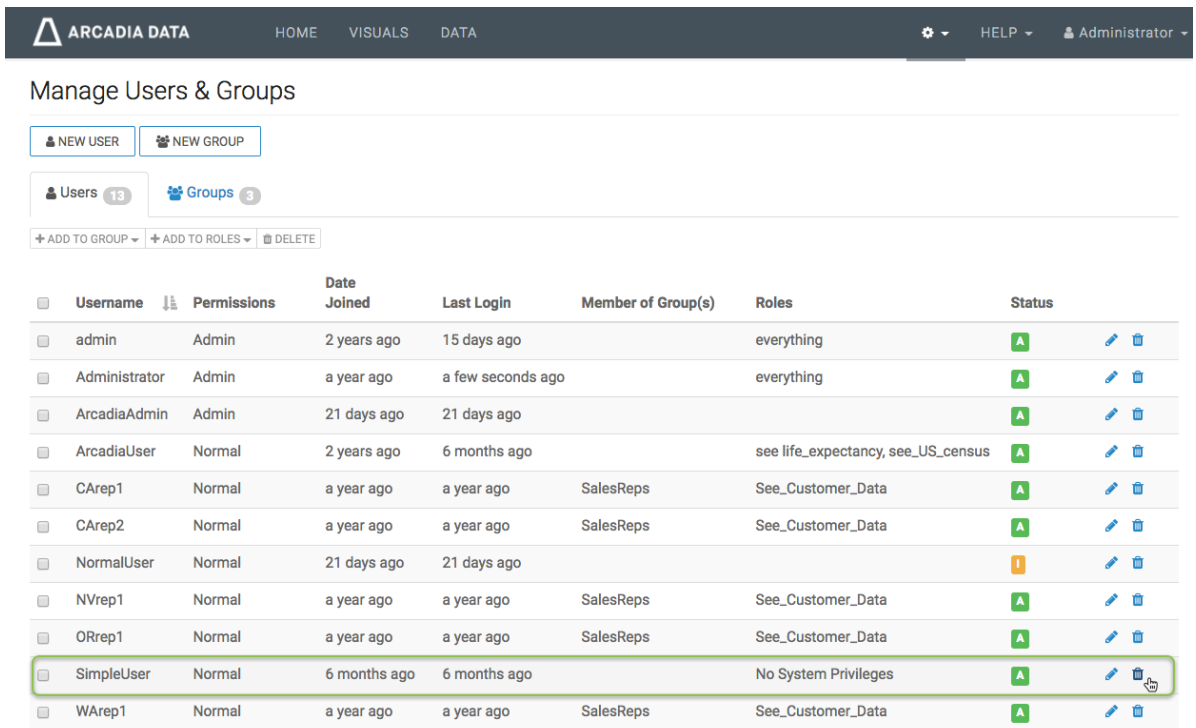
2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of users, do one of the following:

- Find the Username of the account you want to delete, and click Trashcan icon.



The screenshot shows the 'Manage Users & Groups' page in the Arcadia Data application. The page has a dark header with the Arcadia Data logo and navigation links (HOME, VISUALS, DATA). Below the header, there are buttons for 'NEW USER' and 'NEW GROUP'. A tab for 'Users' is selected, showing 13 users. Below the tab, there are buttons for 'ADD TO GROUP', 'ADD TO ROLES', and 'DELETE'. The main content is a table of users with the following columns: Username, Permissions, Date Joined, Last Login, Member of Group(s), Roles, and Status. The user 'SimpleUser' is highlighted with a green box, and the trashcan icon in the Status column is being clicked by a mouse cursor.

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	15 days ago		everything	
Administrator	Admin	a year ago	a few seconds ago		everything	
ArcadiaAdmin	Admin	21 days ago	21 days ago			
ArcadiaUser	Normal	2 years ago	6 months ago		see life_expectancy, see_US_census	
CArep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	
CArep2	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	
NormalUser	Normal	21 days ago	21 days ago			
NVrep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	
ORrep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	
SimpleUser	Normal	6 months ago	6 months ago		No System Privileges	
WArep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	

- Click the Username of the account you want to delete, or the edit icon.

You will see the Edit User modal window.

Click Delete user.

Edit User

×

Username

ArcadiaUser

First Name

enter first name

Last Name

enter last name

Change Password

Permissions

☒ Normal user - can access Arcadia site

☐ Admin user - have all permissions to site

Groups

Roles

Homepage

Group Membership

Search

Q

Available to select

☐ Select All

☐ Arcadians

☐ Group One

☐ SalesReps

ADD >>

<<

Selected

Select options from the left

New group name

+ ADD

☒ Active

☐ Inactive

Date joined: April 4th 2017

Last login: April 5th 2017

CANCEL

DELETE USER 

SAVE

4. In the delete confirmation modal window, click Delete.

Are you sure you want to delete
selected user: SimpleUser?

CANCEL

DELETE 

Results

After the operation succeeds, you will see the Users screen. Note that the Username of the account you just deleted is no longer on the list.

Deleting several user accounts

About this task

The following steps demonstrate how to delete several user accounts at the same time.

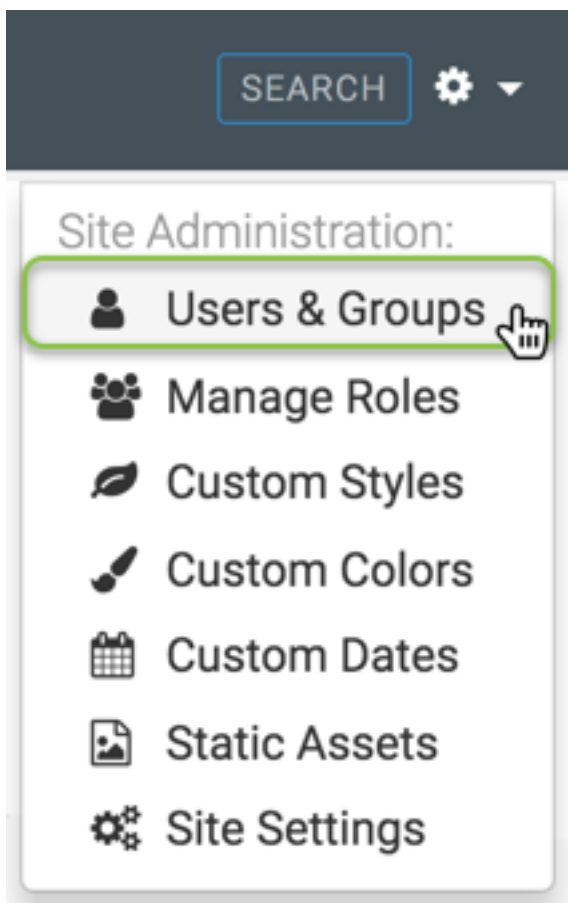
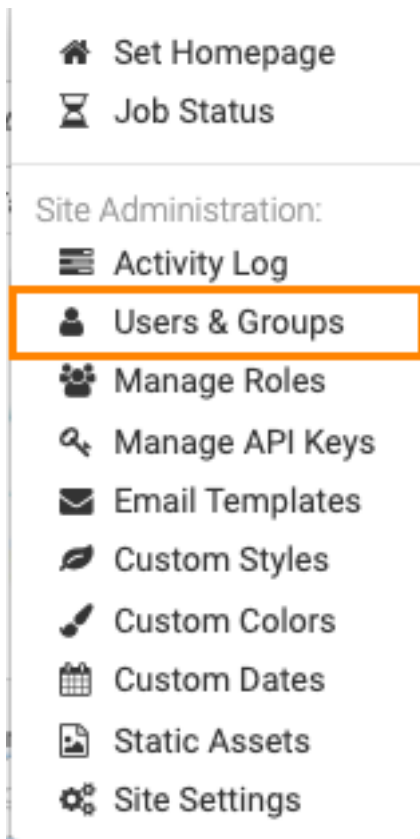


Note: This feature is only available to users with administrative privileges.

Procedure

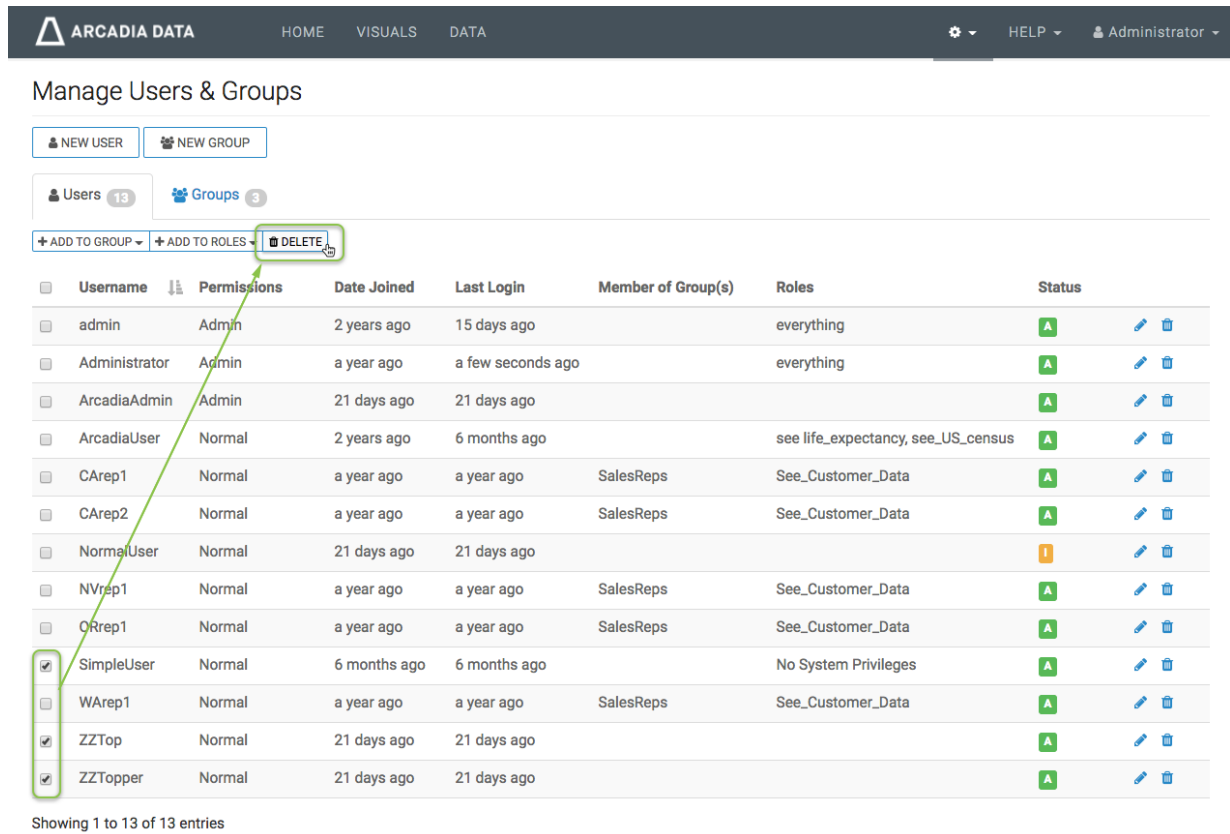
1. On the main navigation bar, click the Gear, icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of users, click the checkmarks next to the Usernames you plan to delete.
4. Click the Delete button.



Manage Users & Groups

NEW USER NEW GROUP

Users 13 Groups 3

+ ADD TO GROUP + ADD TO ROLES DELETE

	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐	admin	Admin	2 years ago	15 days ago		everything	A
☐	Administrator	Admin	a year ago	a few seconds ago		everything	A
☐	ArcadiaAdmin	Admin	21 days ago	21 days ago			A
☐	ArcadiaUser	Normal	2 years ago	6 months ago		see life_expectancy, see_US_census	A
☐	CArep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	A
☐	CArep2	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	A
☐	NormalUser	Normal	21 days ago	21 days ago			I
☐	NVrep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	A
☐	ORrep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	A
☒	SimpleUser	Normal	6 months ago	6 months ago		No System Privileges	A
☐	WArep1	Normal	a year ago	a year ago	SalesReps	See_Customer_Data	A
☒	ZZTop	Normal	21 days ago	21 days ago			A
☒	ZZTopper	Normal	21 days ago	21 days ago			A

Showing 1 to 13 of 13 entries

5. In the delete confirmation modal window, click Delete.

Are you sure you want to delete
selected users: SimpleUser,
ZZTop, ZZTopper?

CANCEL DELETE

Creating new user groups

About this task

An admin user can create new user groups.

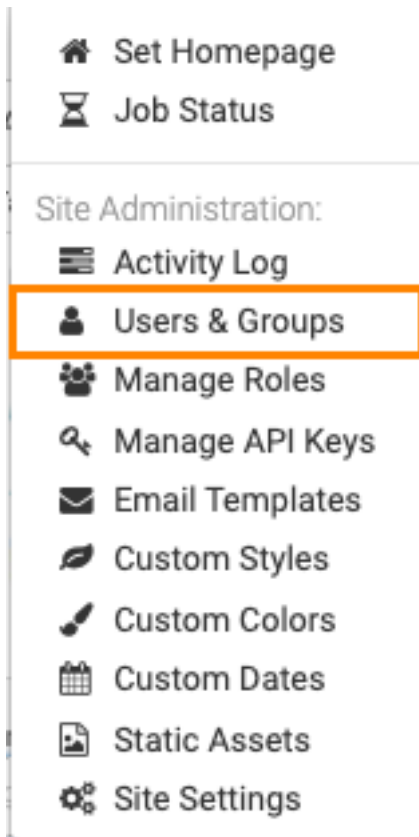


Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to create a new user group.

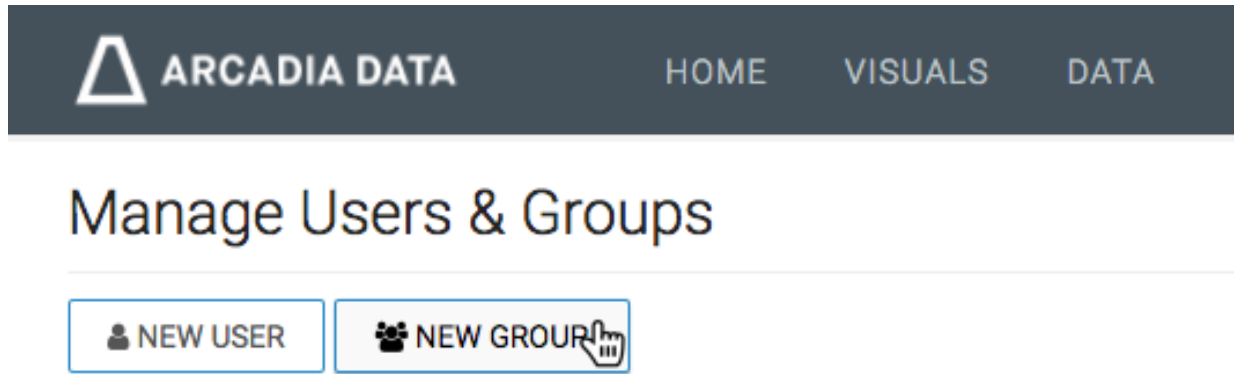
Procedure

1. On the main navigation bar, click the gear icon.
2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

3. Click New Group.



The New Group modal window appears.

4. In the New Group modal window:

- Enter Group Name. We used Arcadia.
- [Optional] Under Members, use the Search box to find users, and assign the new user to existing groups by selecting user groups on the left list, and then clicking Add to move them to the right.
- Click Save.

New Group ✕

Group name

Arcadia

Users

Roles

Members

Search

Available to select

☐ Select All

☐ CArep1

☐ CArep2

☐ NVrep1

☐ NormalUser

☐ ORrep1

☐ SimpleUser

☐ WArepl

☐ ZZTop

ADD >>

<<

Selected

☐ Select All

☐ Administrator

☐ ArcadiaAdmin

☐ ArcadiaUser

CANCEL

SAVE 

5. Click Save.

6. After the operation succeeds, you can check the Users interface, and see that the group assignment applies to the users just assigned to the new group, Arcadia.

The screenshot shows the 'Manage Users & Groups' interface with the 'Users' tab selected. The table below shows the list of users, with the 'Arcadia' group highlighted for three users: Administrator, ArcadiaAdmin, and ArcadiaUser.

Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
admin	Admin	2 years ago	15 days ago		everything	A
Administrator	Admin	a year ago	3 hours ago	Arcadia	everything	A
ArcadiaAdmin	Admin	21 days ago	21 days ago	Arcadia		A
ArcadiaUser	Normal	2 years ago	6 months ago	Arcadia	see life_expectancy, see_US_census	A

7. Similarly, the Groups tab shows that the group Arcadia is part of the list, and lists its three (3) members (ArcadiaUser, ArcadiaAdmin, and Administrator).

The screenshot shows the 'Manage Users & Groups' interface with the 'Groups' tab selected. The table below shows the list of groups, with the 'Arcadia' group highlighted, showing its three members: ArcadiaAdmin, ArcadiaUser, and Administrator.

Group	# Members	Members	Roles
Arcadia	3	ArcadiaAdmin ArcadiaUser Administrator	

Editing user groups

About this task

When editing a user group, you can change its name, and the users assigned to it.



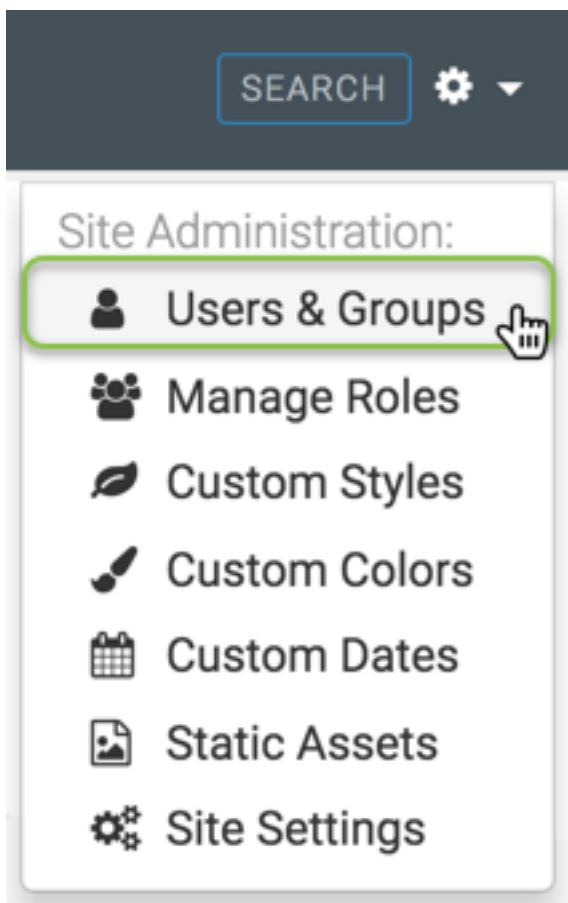
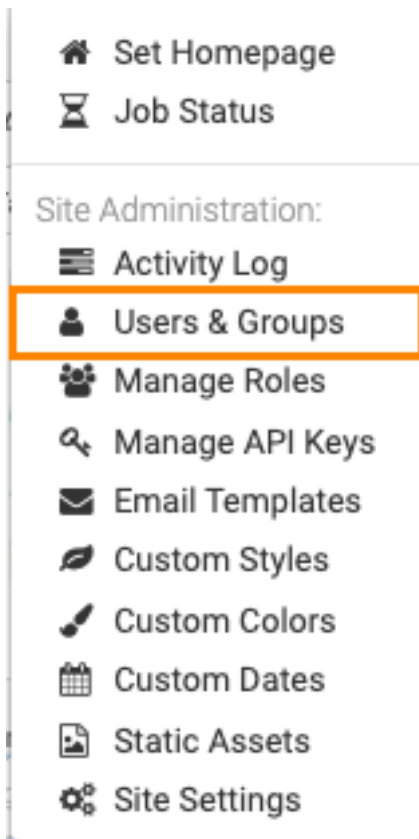
Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to edit user groups.

Procedure

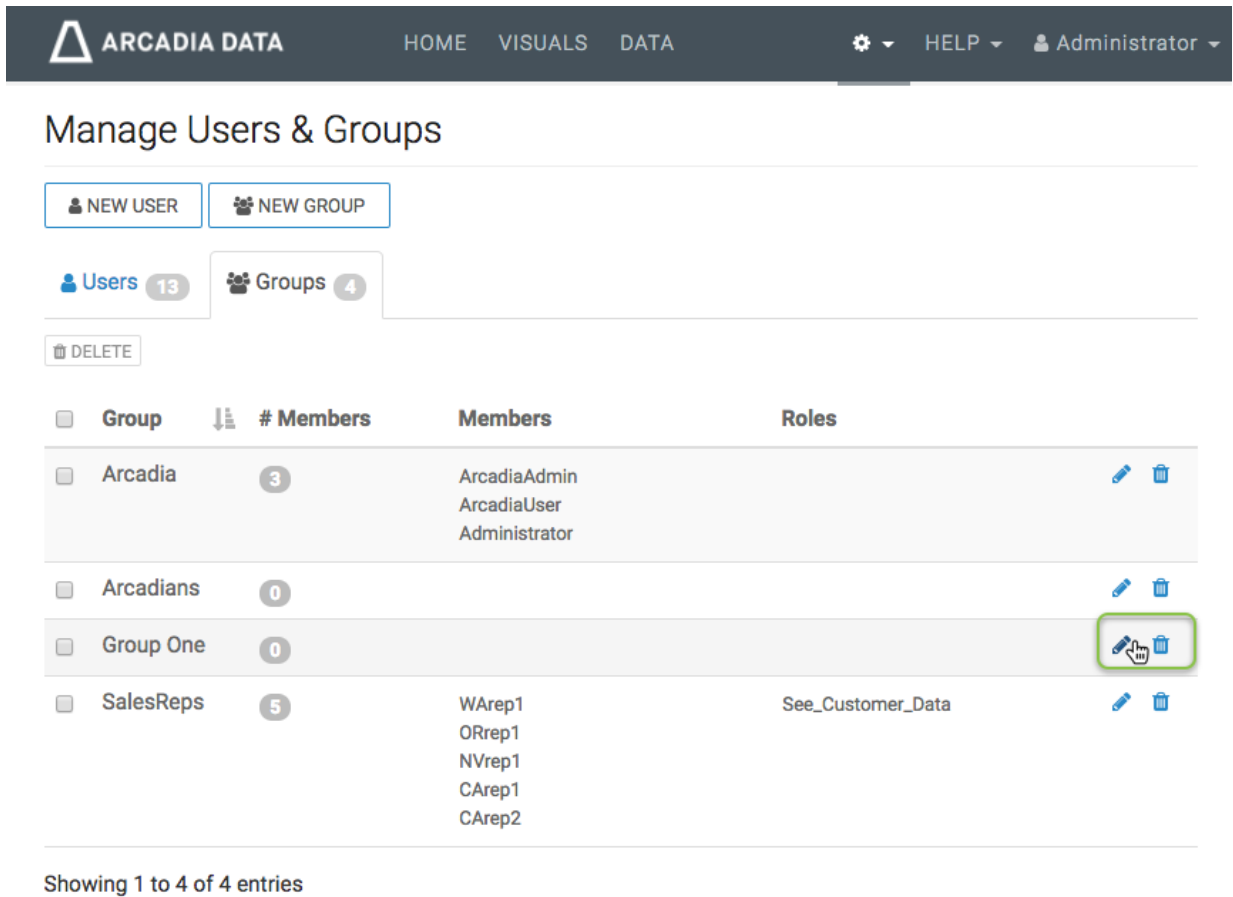
1. On the main navigation bar, click the Gear icon.

2. In the drop-down menu, click Users & Groups.



The Manage Users & Groups interface appears, open on the Users tab.

- Click the Groups tab.
- In the list of user groups, click the name of the user group to edit, or the Pencil icon on that row.



ARCADIA DATA HOME VISUALS DATA HELP Administrator

Manage Users & Groups

NEW USER NEW GROUP

Users 13 Groups 4

DELETE

☐	Group	# Members	Members	Roles
☐	Arcadia	3	ArcadiaAdmin ArcadiaUser Administrator	
☐	Arcadians	0		
☐	Group One	0		
☐	SalesReps	5	WArep1 ORrep1 NVrep1 CArep1 CArep2	See_Customer_Data

Showing 1 to 4 of 4 entries

- The Edit Group modal window appears.

6. To change the name of the user group, simply change the text in the Group name field, and click Save.

Edit Group

Group name

Group One

Users

Roles

Members

Search

Available to select

☐ Select All

☐ Administrator

☐ ArcadiaAdmin

☐ ArcadiaUser

☐ CArep1

☐ CArep2

☐ NVrep1

☐ NormalUser

☐ ORrep1

ADD >>

<<

Selected

Select options from the left

CANCEL

DELETE GROUP

SAVE

Results

Note that the edited group is part of the Groups list.

[HOME](#)
[VISUALS](#)
[DATA](#)

Administrator

Manage Users & Groups

NEW USER

NEW GROUP

Users 13

Groups 4

DELETE

☐	Group	# Members	Members	Roles	
☐	Arcadia	3	ArcadiaAdmin ArcadiaUser Administrator		
☐	Arcadians	0			
☐	Group 1	0			
☐	SalesReps	5	WArep1 ORrep1 NVrep1 CArep1 CArep2	See_Customer_Data	

Showing 1 to 4 of 4 entries

To assign users or roles to a group, see *Adding users to user groups*.

Related Information

[Adding users to user groups](#)

Adding users to user groups

Users can be added to groups in several ways:

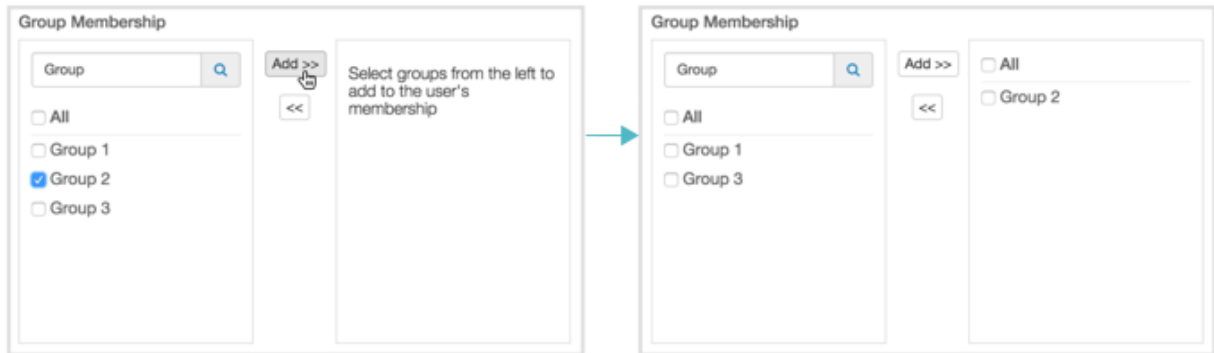
- [Adding a user to multiple groups; user modal](#) on page 61: Individual users can be added to one or more user groups in the New User or Edit User modal window.
- [Adding multiple users to a single group; group modal](#) on page 63: Multiple Users can be added to a single user group in the New Group or Edit Group modal windows.
- [Adding multiple users to multiple groups; users tab](#) on page 64: Multiple Users can be added to multiple user groups on the Users tab.

Adding a user to multiple groups; user modal

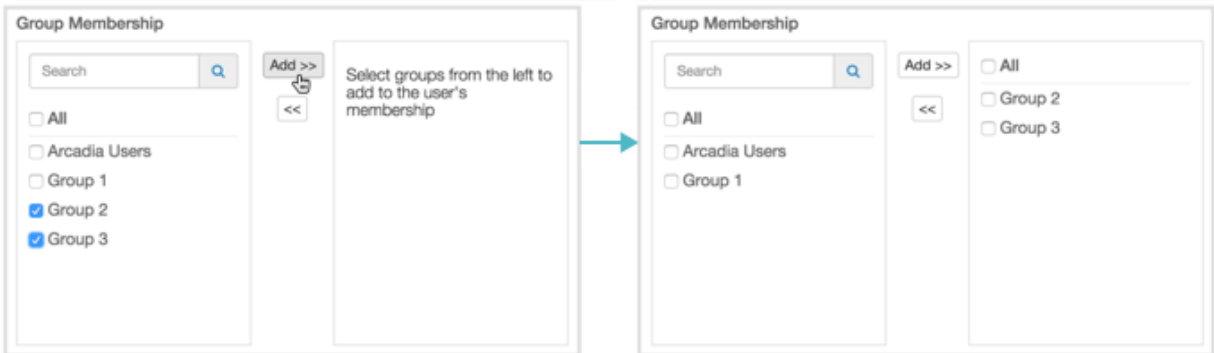
Procedure

There are several options for adding a user to user groups when working in the New Group or Edit Group modal window:

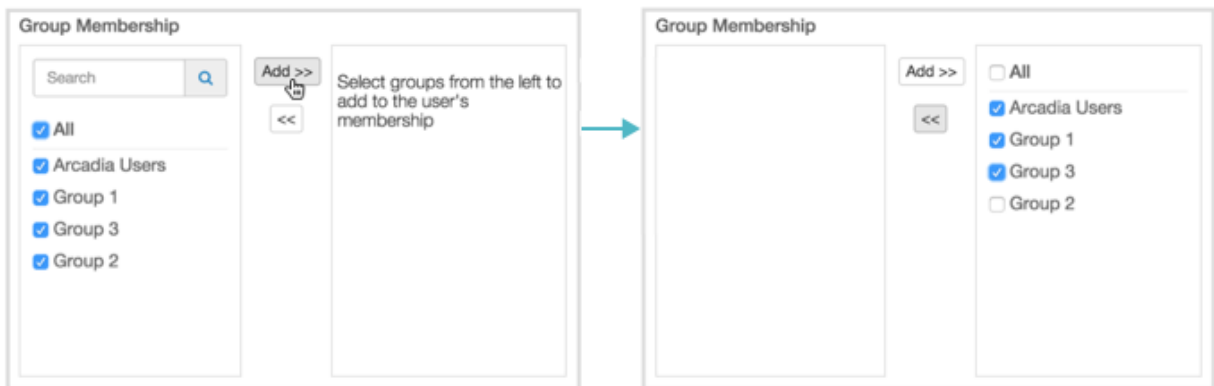
- If you have a long list of groups in the Group Membership section, use the Search box to match group names, select groups from the sub-list, and then click Add to move them to the right side of the modal window. Click Save.



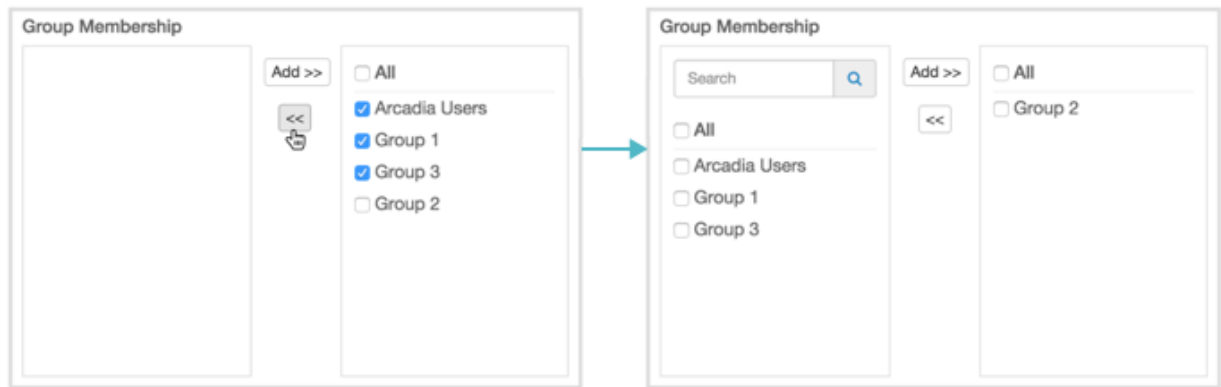
- In the Group Membership section, select the group to assign to the user and click Add to move them to the right side of the modal window. Click Save.



- To assign the user to all user groups, select All to get all the groups, and then click Add to move them to the right side of the modal window. Click Save.



- To move the user out of one or more groups, select the groups on the right side panel, and then click the Left Arrow. Click Save.



Adding multiple users to a single group; group modal

Procedure

There are several options for adding users into a specific user group when working in the New Group or Edit Group modal window:

- If you have a long list of users in the Members section, use the Search box to match usernames, select users from the sub-list, and then click Add to move them to the right side of the modal window. Click Save.

ARCADIA DATA

[HOME](#)
[VISUALS](#)
[DATA](#)

[HELP](#)
Administrator

Manage Users & Groups

NEW USER

NEW GROUP

Users 13

Groups 4

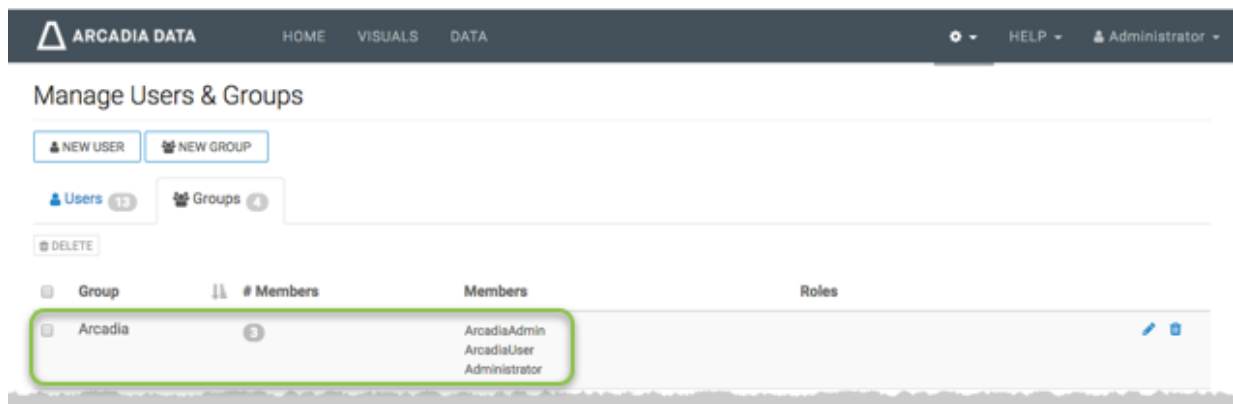
+ ADD TO GROUP

+ ADD TO ROLES

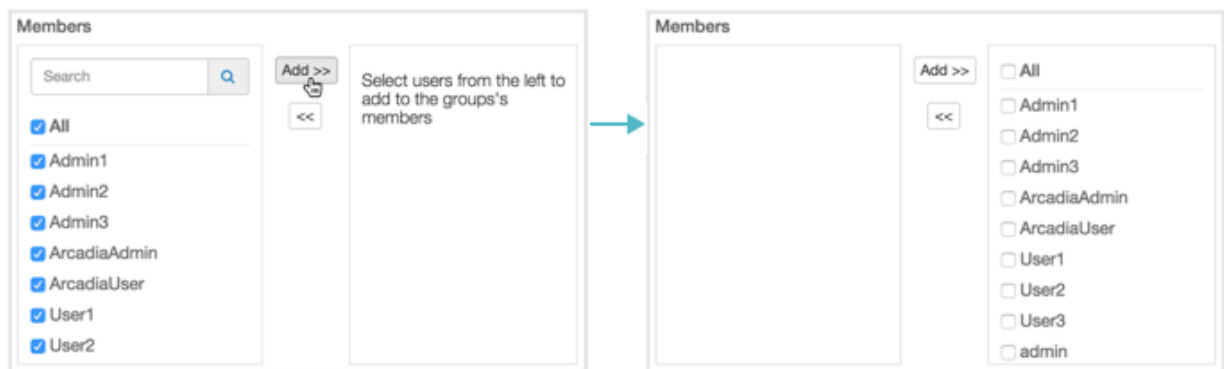
DELETE

☐	Username	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐	admin	Admin	2 years ago	15 days ago		everything	▲
☐	Administrator	Admin	a year ago	3 hours ago	Arcadia	everything	▲
☐	ArcadiaAdmin	Admin	21 days ago	21 days ago	Arcadia		▲
☐	ArcadiaUser	Normal	2 years ago	6 months ago	Arcadia	see life_expectancy, see_US_census	▲

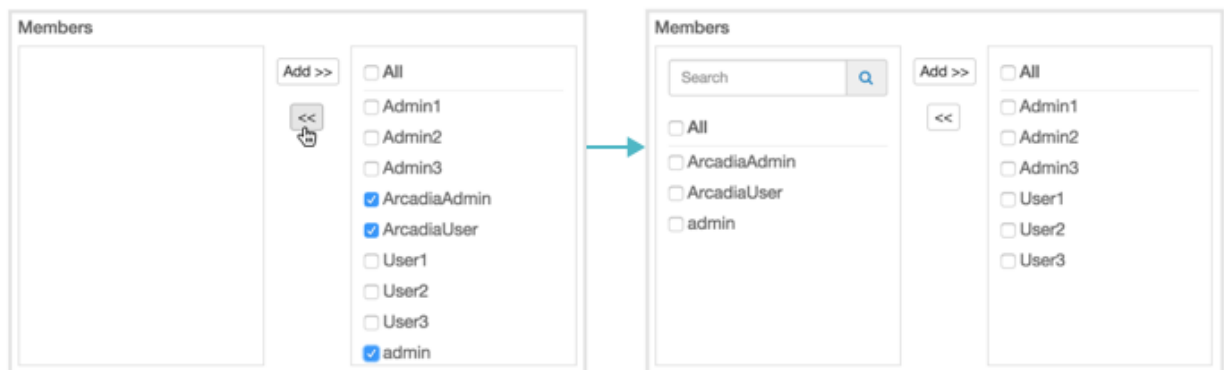
- In the Members section, select the users to assign to the group and click Add to move them to the right side of the modal window. Click Save.



- To add all users to a particular group, select All, and then click Add. Click Save.



- To move users out of the group, select the users on the right side panel, and then click the Left Arrow. Click Save.



Adding multiple users to multiple groups; users tab

About this task

When working in the Users tab, you can add multiple users to one or more user groups:

Procedure

- Select the users that you want to assign to groups. We used User1 and User2.

- Click the Down Arrow on the right of Add to Group, and select the groups for the users. We used Arcadians and Group 1.
- Click Save.

Manage Users & Groups

The screenshot shows the 'Manage Users & Groups' interface. At the top, there are buttons for 'New User' and 'New Group'. Below these are tabs for 'Users' (9) and 'Groups' (3). A toolbar contains '+ Add to Group', '+ Add to Roles', and 'Delete'. A dropdown menu is open under '+ Add to Group', showing a list of groups: 'Arcadia Users' (unchecked), 'Arcadians' (checked, with a blue circle '2' next to it), and 'Group One' (checked). A 'Save' button is at the bottom of the dropdown, with a blue circle '3' next to it. The main table lists users with columns: Permissions, Date Joined, Last Login, Member of Group(s), Roles, and Status. The table contains several rows, including 'User1', 'User2', and 'User3', which are highlighted with a blue circle '1' next to their checkboxes.

	Permissions	Date Joined	Last Login	Member of Group(s)	Roles	Status
☐ Admin3	Normal	3 months ago	3 months ago			A
☐ ArcadiaAdmin	Admin	3 months ago	3 months ago	Arcadia Users, Arcadians		A
☐ ArcadiaUser	Normal	3 months ago	a month ago	Arcadia Users, Arcadians		A
☒ User1	Normal	3 months ago	3 months ago		Test Role 1	A
☒ User2	Normal	3 months ago	3 months ago		Test Role 1	A
☐ User3	Normal	3 months ago	3 months ago		Test Role 1	A

Assigning roles to user groups

About this task

In this article, we demonstrate how to add user groups to a role. We are using an existing role Administrators Only. To assign user groups to existing roles, follow these steps:

Procedure

1. Under the Members tab, in the Users list, click Edit User(s).

For information about the Require all groups option, see the <http://documentation.arcadiadata.com/latest/pages/topics/members-member-group-1.html#all-member-group-requirement> topic.

☒ Privileges ☒ Members

Users 0 **EDIT USER(S)**

Username	First Name	Last Name
(these users were explicitly added and are not necessarily part of the added groups)		

Groups 0 ☐ Require all groups **EDIT GROUP(S)**

Group Name

The Role Assignment modal window for groups appears.

Role Assignment X

Members

Search

Available to select

☐ **Select All**

☐ Administrators

☐ Arcadians

☐ Everyone

☐ Group One

☐ SalesReps

ADD >>

<<

Selected

Select groups from the left to add to the role's members

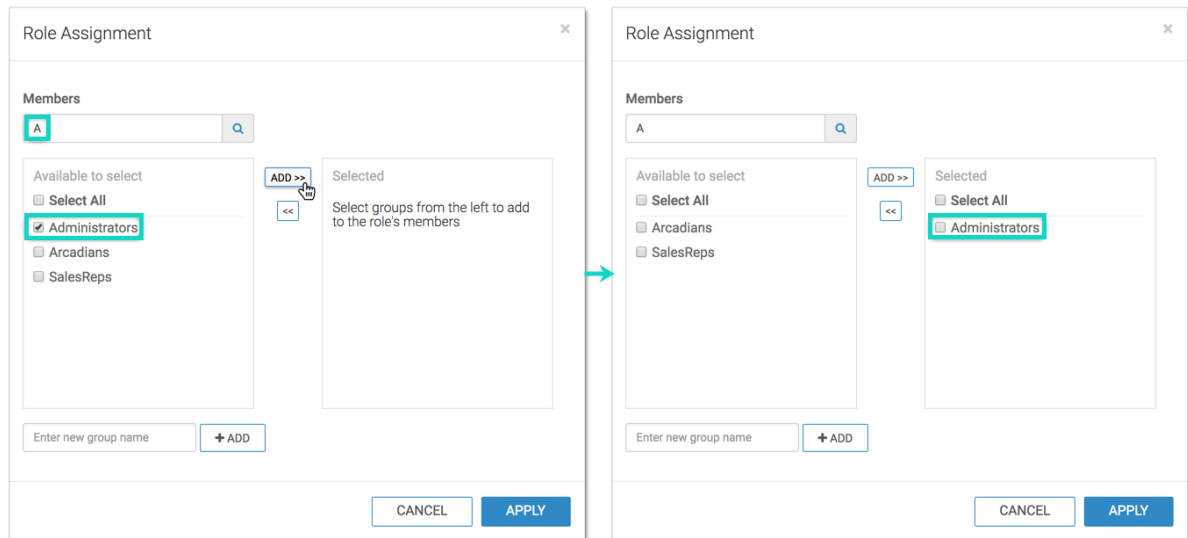
Enter new group name **+ ADD**

CANCEL **APPLY**

2. There are several options for adding groups to role membership:

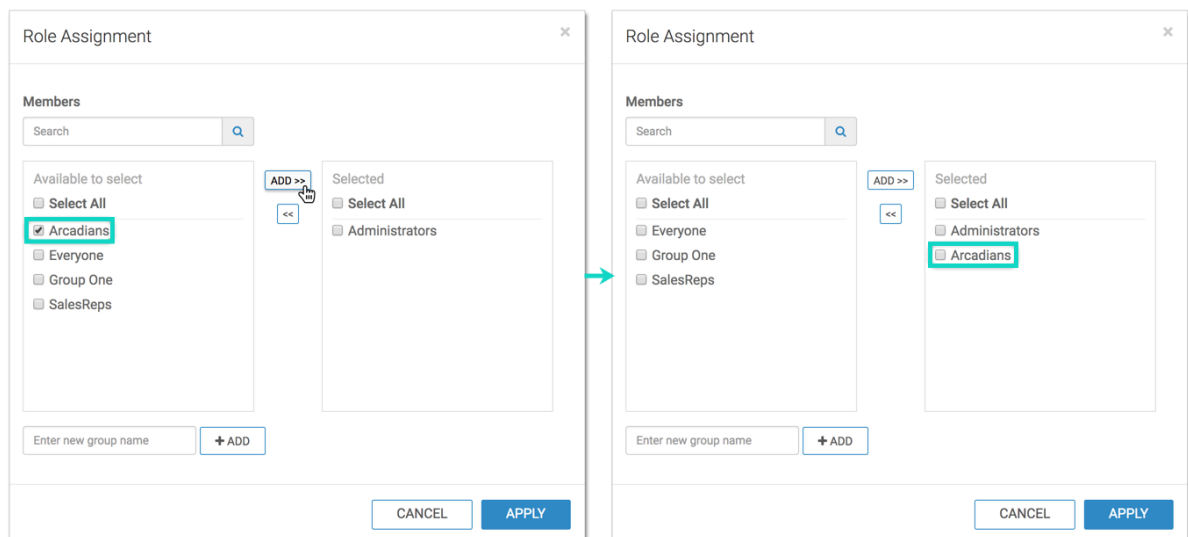
- *Search*

If you have a long list of groups in the Members section, use the Search box to match group names, select them from the sub-list, and then click Add to move them to the right side of the modal window. Click Apply.



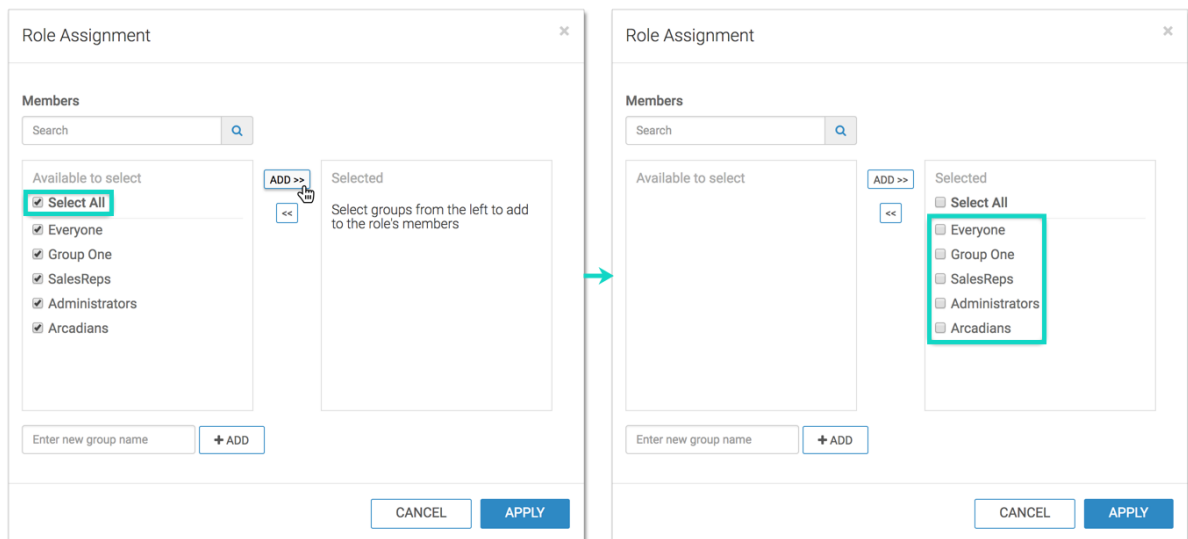
- *Select*

In the Members section, select the groups to assign to the role and click Add to move them to the right side of the modal window. Click Apply.



- *Select All*

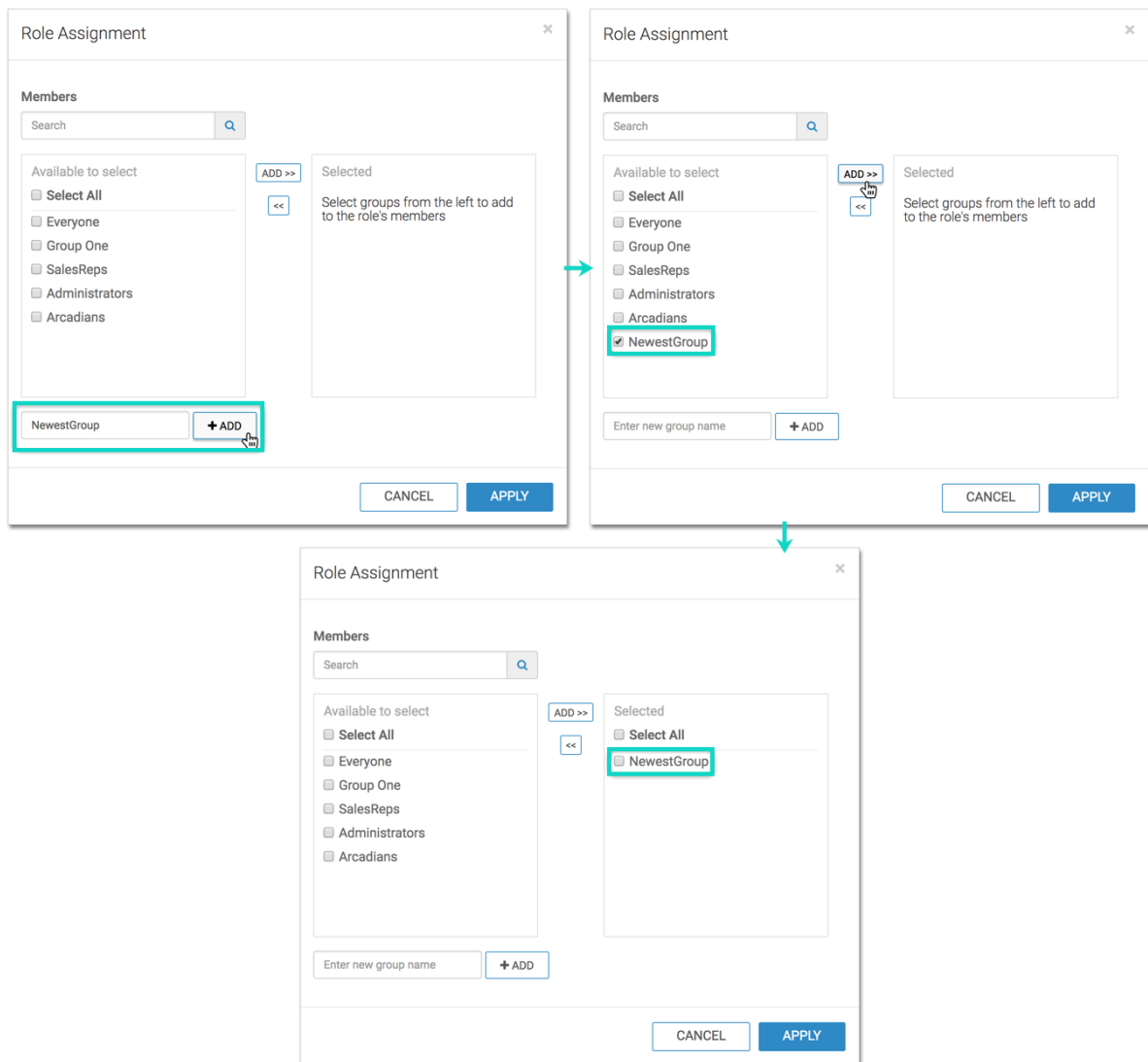
To assign all groups to Members, select All to get all group names, and then click Add to move them to the right side of the modal window. Click Apply.



- *Adding Externally Defined Users; LDAP Authentication*

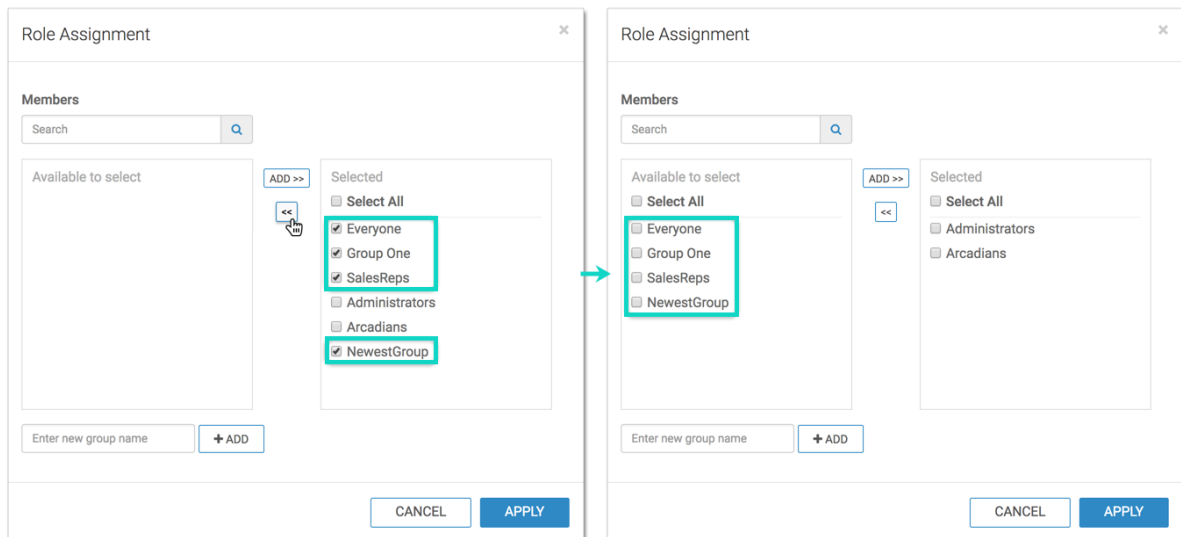
For convenience, the Role Assignment interface supports adding into the list of assignees user groups that are not stored locally. For example, known groups available through LDAP authentication may be added in this manner.

Enter the new group name, and click Add. After the new group name appears in the Members section, select it and click Add to move the new group to the right side of the modal window. Click Apply.



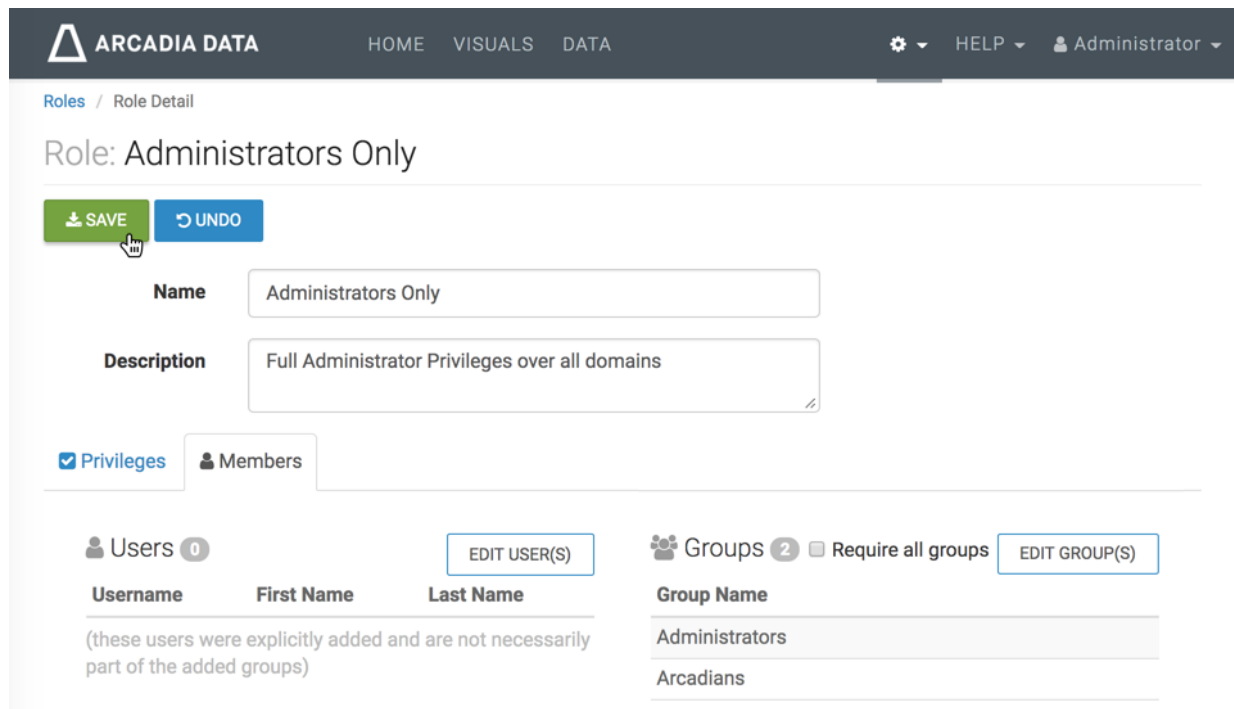
- **Remove**

To move groups out of Members, select the group(s) on the right side panel, and then click the Left Arrow. Click Apply.



The list of groups assigned to the role appears in the Role: Administrators Only interface, under the Members tab.

3. Click Save. A confirmation of role update appears briefly on the screen.



Deleting user groups

About this task

An administrator can delete user groups.



Note: This feature is only available to users with administrative privileges.

The following steps demonstrate how to delete a previously defined user group.

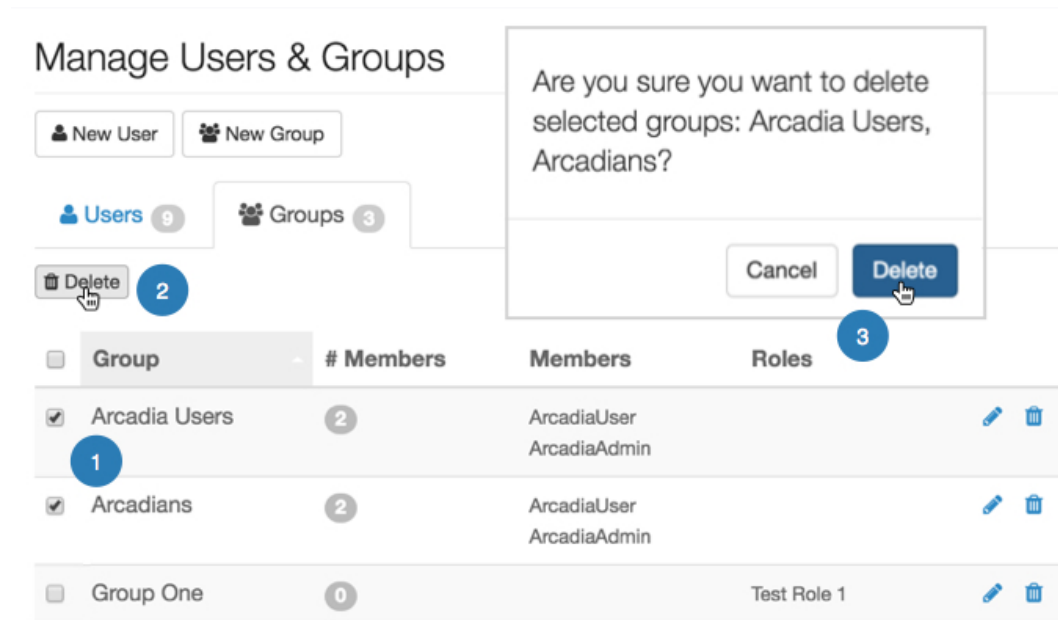
Procedure

1. Click the Groups tab.

2. There are several ways for deleting user groups:

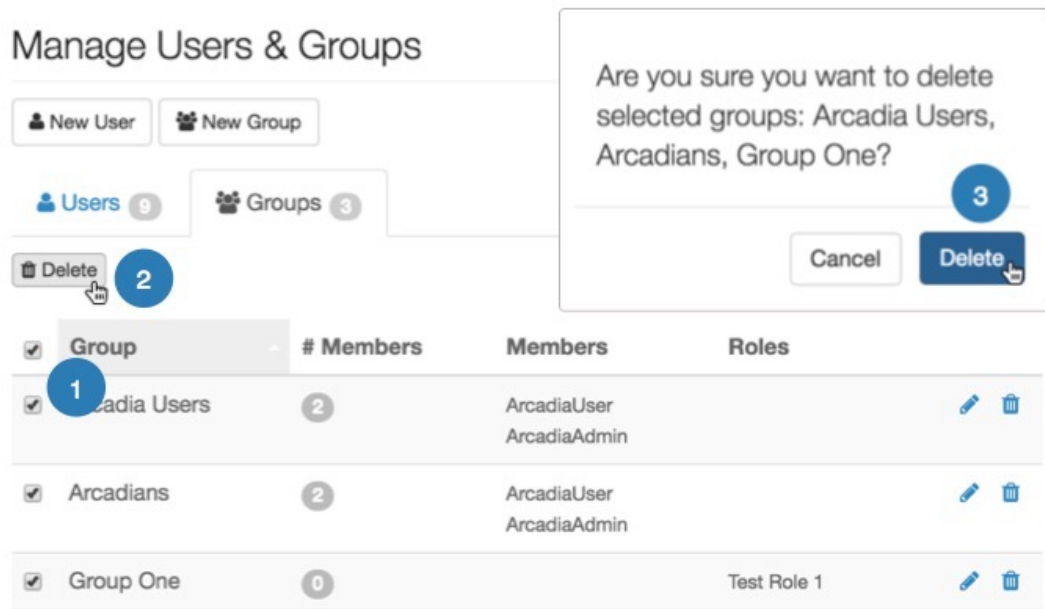
Method 1:

- a. Click on the select boxes next to the names of the user groups.
- b. Click Delete.
- c. In the confirmation window modal, click Delete.



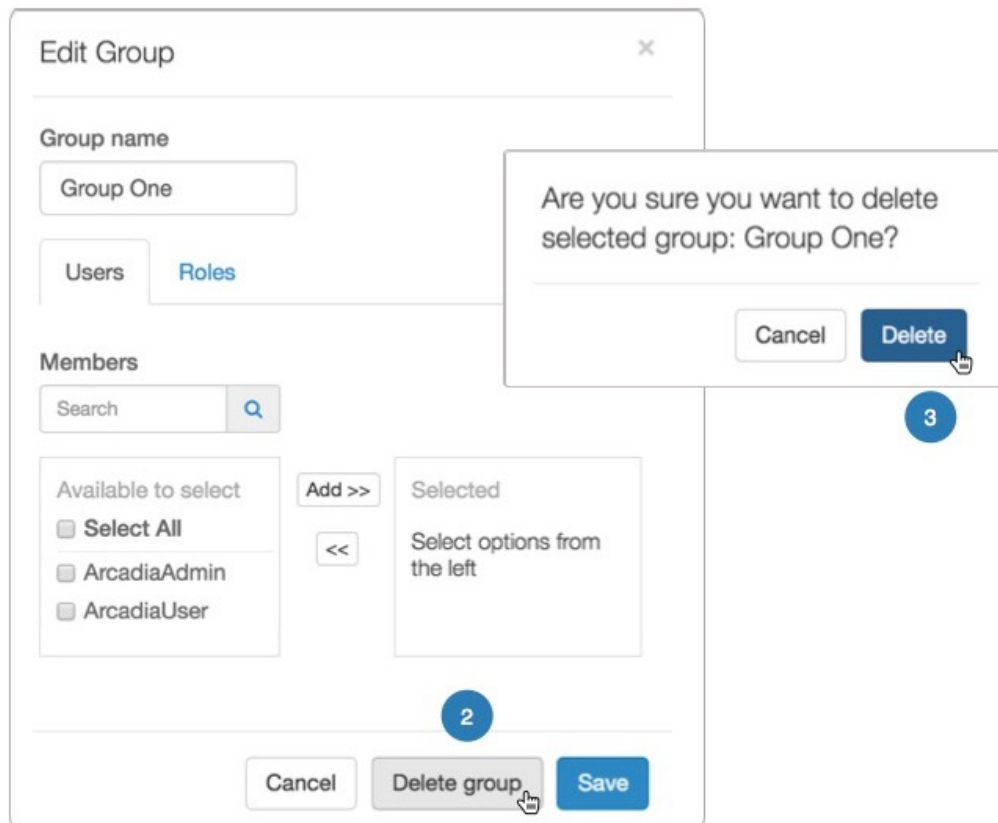
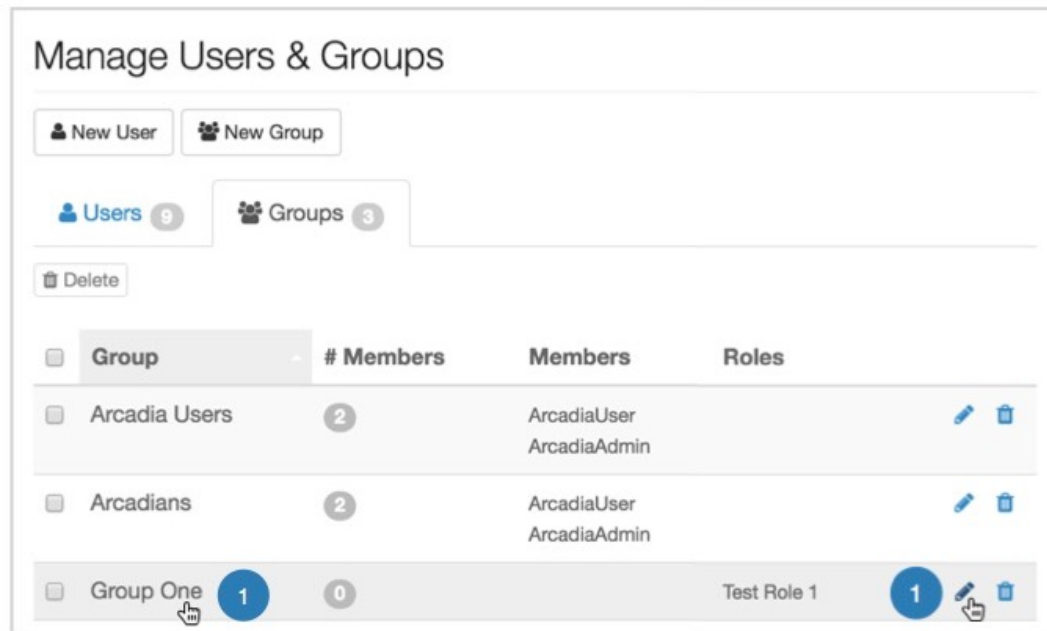
Method 2:

- a. Click on the select box next to the table header Group.
This Selects all user groups.
- b. Click Delete.
- c. In the confirmation window modal, click Delete.



Method 3:

- a. Click the name of the user group.
Alternatively, click the Pencil icon.
- b. In the Edit Group window modal, click Delete group.
- c. In the confirmation window modal, click Delete.



Method 4:

- a. Click the Trashcan icon that corresponds to the user group.

- b. In the confirmation window modal, click Delete.

Manage Users & Groups

New User New Group

Users 9 Groups 3

Delete

Are you sure you want to delete selected group: Group One?

Cancel Delete

☐	Group	# Members	Members	Roles	
☐	Arcadia Users	2	ArcadiaUser ArcadiaAdmin		
☐	Arcadians	2	ArcadiaUser ArcadiaAdmin		
☐	Group One	0		Test Role 1	