Add, Edit, and Delete Users

As an Evergage administrator, you can add new users, update existing users including assigning new passwords, or delete users altogether using the *Manage Users* utility in Evergage. If your company uses single sign-on, you will still need to add, delete, or update users through *Manage Users*.
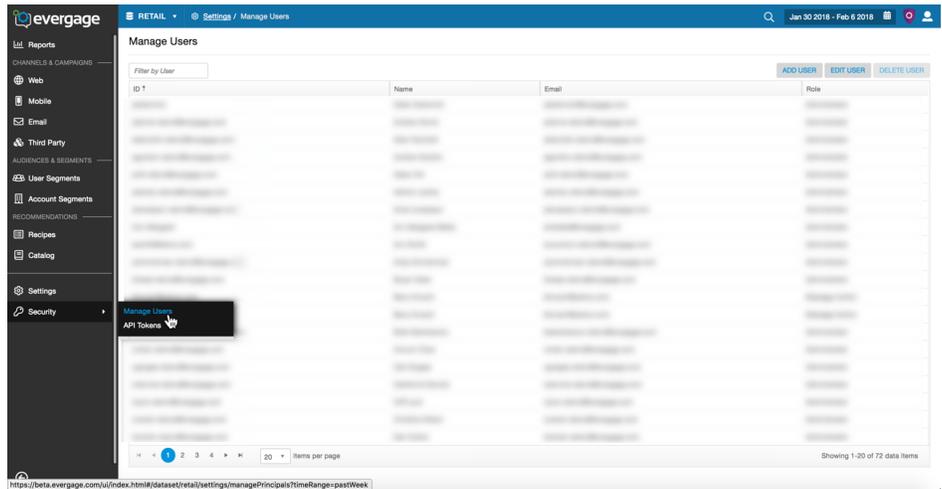
This Article Explains	Sections in this Article
This section details how to add, edit and delete users in Evergage.	- Access Manage Users - Add New Users - Edit a User - Delete a User

Access Manage Users

1. Log into the **Evergage Platform** as an administrator
2. Select **Security** > **Manage Users**

Add New Users

1. Access *Manage Users*
2. Click **ADD USER**
3. Enter the **User Name**, **Email Address**, **First Name**, and **Last Name**

> **NOTE**
>
> If you delete a user, you will not be able to create a new user with the same email address. Please contact Support for assistance.

4. **Send Activation Email** is selected by default, which emails the user with instructions for logging in the first time
5. Select the user **Role**:
   - *Viewer*–can view everything but not make any updates
   - *Campaign Author*–can view everything and create, update, and delete campaigns, but cannot publish campaigns or edit or delete published campaigns. Can create, update, and delete segments that are not included in campaigns. Can add and edit recipes, but not publish new recipes. Can delete recipes not used in any campaigns.
   - *Campaign Editor*–can view everything and create, update, publish, and delete campaigns and recipes
   - *Editor*–can view everything, create, update, publish, and delete campaigns, and create, update, and delete segments, user attributes, and items

- *Editor with Export*–has all of the rights of an Editor, and can export segments and datasets
- *Administrator*–has all the rights of an Editor with Export and can configure the system, create and update datasets, manage users, and add, edit, or delete API tokens

6. Add **Notes** about the user as needed
7. Click **OK** to add the user, **CLEAR** to clear all fields but remain in *Create User*, or **CANCEL** to return to *Manage Users* without adding the user

Edit a User

1. Access *Manage Users*
2. Select the user from the list or enter partial ID, name, or email address in Filter by User to search for a user
3. Click **EDIT USER**
4. You can update the **Email Address**, **First Name**, or **Last Name**, but not **User Name**
5. To update the password, enter the new password in **Password** and **Confirm Password**

> **NOTE**
>
> Alternatively, if a user has forgotten his or her password, s/he can click *Forgot your password?* on the login screen to reset the password

6. Select a new **Role** as needed
7. Click **OK** to update the record, **CLEAR** to clear all changes but remain in *Create User*, or **CANCEL** to return to *Manage Users* without making changes

Edit User asmith@demo.com

User Name	Email Address
asmith@demo.com	asmith@abc.com

First Name	Last Name
Ann	Smith

Password	Confirm Password

Role

VIEWER   CAMPAIGN AUTHOR   CAMPAIGN EDITOR   EDITOR
EDITOR WITH EXPORT   ADMINISTRATOR

Has full rights in the Evergage platform, including the ability to create and update datasets, manage users, and add, edit, or delete API tokens.

Notes

CLEAR   OK   CANCEL

Delete a User

1. Access *Manage Users*
2. Select the user from the list or enter partial ID, name, or email address in Filter by User to search for a user
3. Click **DELETE USER**
4. Click **DELETE** to delete the user or **CANCEL** to return to *Manage Users*

Delete User

Are you sure you want to delete this user?

CANCEL   DELETE