Users Page

Contents:

- *Status*
- *Invite Users*
- *Edit Users*
- *Roles*
    - *default*
    - *Workspace admin*
    - *Custom role*

Feature Availability: This feature is available in the following editions:

- Trifacta® Enterprise Edition
- Trifacta Professional Edition
- Trifacta Starter Edition
- Trifacta Premium

The Users page enables adding, disabling, or removing users from your project or workspace. You can also reset passwords and change roles.

Figure: Users Page

Tabs:

- Click one of the tabs to display all users or a filtered list based on user status.

- Pending invitations can be reviewed in the Invited tab.

Fields:

- **Name:** Display name for the user. Click the name of the user to review details about the user account. See *User Details Page*.
- **Email:** Username (email address of users)
- **Status:** Current status of the user. See "Status" below.
- **Last login:** Timestamp for the last time that the user logged in to the Trifacta application

Actions:

- **Invite users:** See "Invite Users" below.

- **Search:** Enter text to begin searching for specific usernames or email addresses.

- **Sort:** Click a column name to sort the list of users in ascending or descending order.

Context menu actions:

For each user, you can perform the following actions in the context menu:

- **Configure storage:** If per-user access is enabled, you can configure the access credentials for individual users, either using key-secret combinations or IAM roles. For more information, see *Configure Your Access to S3*.

- **Edit:** Modify user properties, including platform roles. See "Edit Users" below.

- **Reset password:** Self-service password reset is enabled by default. If enabled, click this option to send an email to the user to reset his or her password.

Disable: When a user is disabled, the user cannot access the Trifacta application.

- The disabled user still counts against the project or workspace limit.
- All of the user's flows and datasets are retained.

> **NOTE:** Schedules owned by a disabled user continue to execute. An admin can disable the schedule. See *Schedules Page*.

- Resources such as connections and flows that are owned by the user become inaccessible to other users that have access.
- To permit access again, select **Enable.**

- **Remove:** When a user is removed, the user's account, including all assets such as imported datasets, samples, and recipes, are removed from the Trifacta application.
  - At time of removal, you can choose to transfer ownership of the user's assets to another user. If those assets are not transferred, they are removed with the user's account.

> **If you must recover a removed user or that user's assets, please contact *Trifacta Support* within 14 days of the deletion.**

  - An admin cannot remove himself or herself from the project or workspace.

Status

Users can be set to one of the following statuses:

- **Invited:** User has been sent an email but has not yet clicked the link to activate the account.

- **Enabled:** User can log in and use the Trifacta application normally.

- **Disabled:** User account has been disabled by an administrator. User cannot use the project or workspace.

> **NOTE:** A disabled user's flows and datasets are still stored within the Trifacta application. However, the user cannot access them. Ownership of these objects has not been transferred. An administrator has ownership privileges on the user's objects.

Invite Users

To invite users to your project or workspace, please do the following:

> **NOTE:** When a user accepts your invitation, the additional user counts toward the maximum number of permitted users.

> **NOTE:** If you are re-inviting a user who has been removed, you must wait 14 days to invite the user back to the same project or workspace and retain the user's data. If restoring the user's flows and recipes is not important, please contact *Trifacta Support* for immediate re-instatement.

For more information, see *Invite Users*.

Edit Users

To modify a user account, please complete the following steps.

> **NOTE:** For security reasons, an administrator is not permitted to edit some settings in the administrator's own account.

Steps:

1. Locate the user in the list of users.
2. In the context menu on the right side of the user's listing, select **Edit**.
3. In the Edit User dialog, modify the following properties as needed:

Name: The display name of the user.

Email: The email address is used as the login identifier. This value cannot be modified.

Roles: Select or remove the roles to assign to the user. For more information, see *Roles Page*.

Roles

Users can have one of the following roles:

> **NOTE:** Users whose roles have changed may be logged out of the application. When they log in again, the new roles are applied.

default

A user with the `default` role has basic privileges to use the product.

Workspace admin

A user with the `Workspace admin` role all user privileges, as well as the ability to administer the workspace.

Custom role

As needed, you can create custom roles. For more information, *Create Role*.