



## Retention Data Center Quick Start – Configuration – User Administration

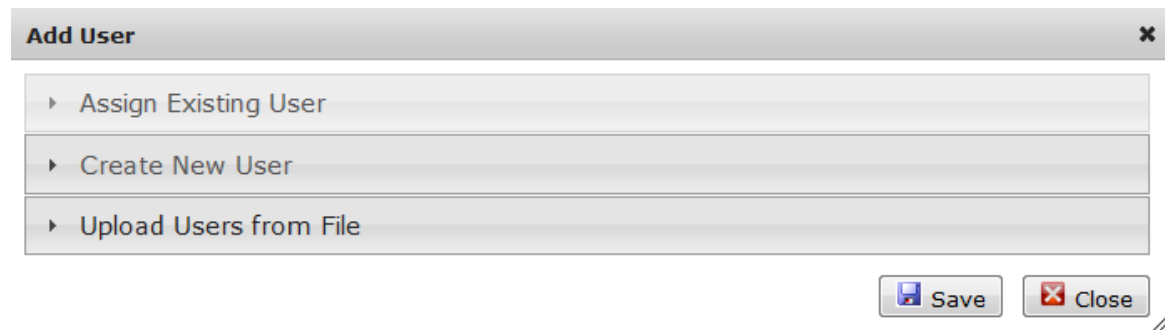
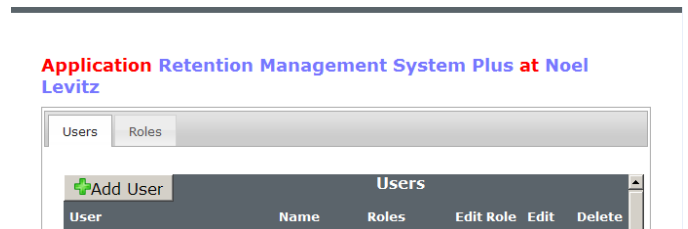
For a Video Tutorial on adding users, click on: [Video Tutorial](#)

**Add and assign permission for colleagues (users) to access student records on a full or limited basis.**

1. Select **CONFIGURATION**
2. Select **User Administration**

- Add User** - Grant access to the Data Center.
- Remove access to the Data Center.
- Edit the record or change the assigned role.

3. Select **Add User**



4. Confirm user is not already in the drop down menu 'Assign Existing User'. This is an indication the person already has established a myRuffaloNL.com account. If found, select the name and assign a role (outlined below). If not found, use *Create New User* or *Upload Users from File* for multiple entries. Once the users account is created, the user can login with their email address and password. If not provided with a copy of their password, they can simply select forgot my login at [www.ruffaloNL.com](http://www.ruffaloNL.com) and a copy of their password will be sent to them.

**Create New User**

E-mail	<input type="text"/>
Password	<input type="text" value="#Welcome1"/>
Comments	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

## To Create New User

1. Complete the following fields in the box presented:

*User Name:* user e-mail address

*Password:* default password (change recommended)

*Comments:* brief note about entry (optional)

*First Name:* user first name

*Last Name:* user last name

*Select Role:* *Select only one* of the roles identified below

2. Select Role: Select only one of the roles identified below
3. Save your work.

The user can now access the Retention Data Center through their secured myRuffaloNL account by logging in at <https://client.ruffalonl.com>. If password for user is unknown they can select “Forgot my Login” and a password is sent to the e-mail address on file.

## Upload Users from file

1. Create File (typically created in excel) and save as Windows CSV (comma separated/comma delimited). The file format is as follows (if you do not wish to provide a comment, leave the column blank):

Column(if using excel)	Field	Max Length	Format	Record Verification
A	User E-mail	60	Required - This will be the user's Login ID. Must be a valid e-mail address.	✓
B	Default Password	50	Required - Alphanumeric and special characters allowed.	✓
C	User First Name	100	Required	✓
D	User Last Name	100	Required	✓
E	Comments	255	Optional	
F	Role	255	Required - options include: Coordinator, Global Advisor, Limited Advisor, Global Data Analyst, Limited Data Analyst, Technical Coordinator.	✓

2. Browse to your saved file and select Upload

### Retention Data Center Roles

Have access to:

	Dashboard	Access can be limited	Restricted Reports	Student Report	Advisor/Counselor Report	Coordinator Report	Summary Reports	E-mail Student	Edit Student Profile	Advisor Notes	Export Data	Import Data	Survey Creation/Modification	Configuration button
Purchaser	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Coordinator	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Global Data Analyst	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Limited Data Analyst	✓	✓		✓	✓		✓	✓	✓	✓	✓			
Global Advisor	✓	✓	✓	✓	✓	✓		✓	✓	✓				
Limited Advisor	✓	✓		✓	✓			✓	✓	✓				
Technical Coordinator	✓										✓	✓		