Manage your Team

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What it is

Under your Team settings you can

- invite other team members to help you create, edit, and manage your Userlane content
- update existing ones
- check out your current team
- enable 2-factor authentication
- set up and enable single sign-on for Managers

Why use it

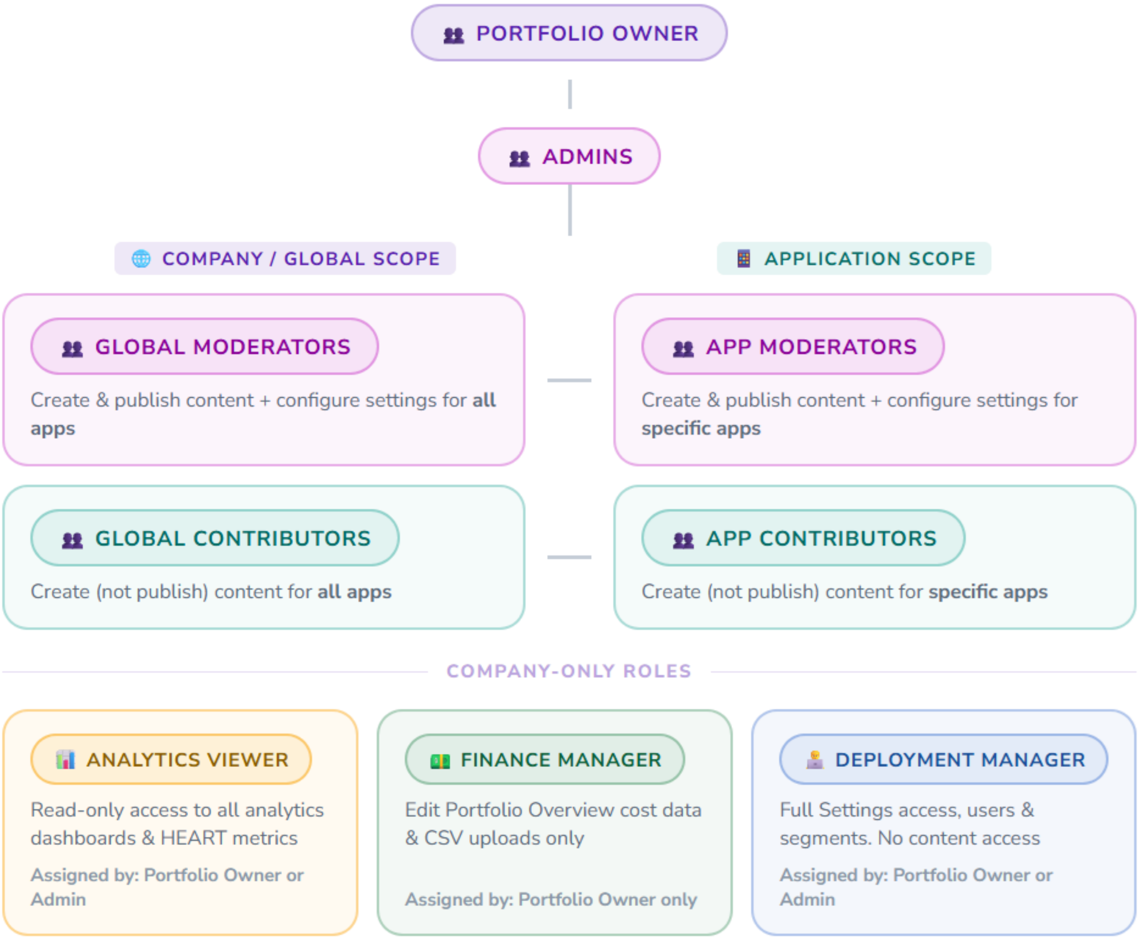
By utilizing team settings and user roles, you can streamline collaboration and enhance productivity within your Userlane environment. Customizable permissions let you maintain control over access levels, optimize workflows, and effectively manage your content.

ℹ Important

- Only Portfolio Owners and Admins can invite team members.
- The Team Members are not visible to your end-users.
- If a limit for your team is reached, reach out to your Customer Value Manager.

Overview of User Roles

Userlane offers seven distinct roles. Four roles are scoped to specific applications, while three are company-level only roles designed for specialized functions.



Role	What they can do	Assigned by	Scope
Admin	Full edit rights everywhere. Can manage and invite team members. No Portfolio Overview access.	Portfolio Owner or other Admins	Company role
Portfolio Owner [Coming soon]	All Admin capabilities plus exclusive Portfolio Overview access (including cost data).	Userlane CVM	Company role
Moderator	Create, publish, and configure content. Company-wide or app-specific scope.	Admin	Company or App
Contributor	Create (not publish) content. Read-only analytics. Cannot see Segments or Customize.	Admin	Company or App

Analytics Viewer	Read-only access to all analytics dashboards and HEART metrics. No content access.	Portfolio Owner or Admin	Company
Finance Man	Edit Portfolio Overview cost data and CSV uploads only. No individual app access.	Portfolio Owner	Company
Deployment Manager	Full Settings access, user and segment management. No content or analytics access.	Portfolio Owner or Admin	Company

Admin

Admins have full edit rights anywhere in the platform and can manage and invite other team members.

Key change: Admins no longer have access to the Portfolio Overview page.

▯ Full content creation and editing (Editor)

▯ Publish content

▯ Invite and manage team members

▯ View analytics

▯ Application and company settings

▯ Portfolio Overview (/applications/portfolio-overview)

Portfolio Owner

The Portfolio Owner has everything a normal Admin has, plus exclusive access to the Portfolio Overview page, including cost information. This role is designed to safely handle sensitive financial data that was previously visible to all Admins.

▯ All Admin capabilities

▯ Portfolio Overview (/applications/portfolio-overview)

▯ Cost and currency data (Company Metadata endpoint)

▯ Invite and manage team members

▯ Editor and content creation

□ Assign Analytics Viewer, Finance Manager, Deployment Manager roles

□ Import / export texts

Moderator

Moderators can create and publish content and configure application settings. They can be scoped to all applications (global) or to specific applications.

□ View team members and other company level settings (Company Moderator only)

□ Create and publish content - all apps (Company) / assigned apps (App)

□ Configure application settings - all apps (Global)

□ View analytics - all apps (Global) / assigned apps (App)

□ Import / export texts

□ Add or edit team members □ Edit company user profiles □ App Moderators cannot see company level settings

Contributor

Contributors can create content but cannot publish it. Their view is limited — they do not see the Segments or Customize sections.

□ Create content — all apps (Global) / assigned apps (App)

□ Auto translate — all apps (Global) / assigned apps (App)

□ Publish content □ Take screenshots in Editor □ View analytics (basic) □ View HEART analytics □ Import / export texts

Analytics Viewer

The Analytics Viewer provides managers and leadership with visibility into performance data without any risk of content or configuration changes. This is the most requested new role. It is a company-level role, so the user gets access across all apps automatically.

□Analytics Overview (/analytics/overview) including Segment analysis

□ Analytics Content (/analytics/content)

□ HEART metrics (/analytics/heart)

□ Applications list (/applications/overview) — read only

□ App Discovery (/applications/app-discovery) — read only

□ Generate API key and access data via API

□ Personal details and API token settings

▯ Segments — read only (user count shown, no user preview)

▯ Page Segments — read only

▯ Add an application ▯ Portfolio Overview (/applications/portfolio-overview) ▯ Editor and content creation ▯ Messages, Users, or other Settings pages ▯ Attributes ▯ Alert notifications (switched off by default)

Finance Manager

The Finance Manager allows finance teams to maintain application cost data and upload CSVs without accessing any individual application, content, or analytics. Access is limited strictly to the multi-app (portfolio) level.

▯ Portfolio Overview — view and edit, including cost data and CSV uploads

▯ Applications list (/applications/overview) — view only

▯ App Discovery — view only

▯ Personal details settings

▯ Open individual applications ▯ Add an application ▯ Analytics pages ▯ Editor and content creation ▯ Any Settings beyond personal details ▯ Alert notifications (switched off by default)

Deployment Manager

The Deployment Manager (also known as IT Admin or Technical Rollout Manager) is built for IT and technical teams during the initial platform rollout. It provides full access to all Settings pages so they can configure everything, without touching content or analytics.

▯ General settings (/application-settings/configuration)

▯ Agentic Assistance / Copilot (if feature flag is on)

▯ Application URLs and Snippet setup

▯ Selectors (/application-settings/selectors)

▯ Team management — view only, cannot invite members

▯ File transfers (/settings/company/processes)

▯ Company users and attributes

▯ Integrations (/settings/company/integrations)

▯ Analytics settings (/settings/company/analytics)

▯ Browser Extension settings (/settings/company/browser-extension)

▯ Personal details and API token

▯ Users, Segments, and Attributes pages (/users/*)

 Editor and content creation Analytics dashboards and reports Guides, Customize, App Discovery, or Portfolio Overview Guide Alert notifications