

Managing Users and Groups

If you're a system admin, user admin, or group admin, use this brief guide to learn how to use the admin console to add, remove, and edit accounts for users and groups. Note that this guide does *not* describe how to set permissions for users and groups. You can set permissions if you're a system or space admin, but not a user or group admin. For more on setting permissions, see *Managing Permissions*.

Summary

- Clearspace can use its own database, an LDAP or Active Directory database, or a custom solution for getting data about users.
- You can edit user data or add new users using the admin console. You can also create user groups to collect users to make assigning permissions easier.
- By default, if a user's data is stored in LDAP, Active Directory, or a custom solution, you can't edit that user's data.
- You can disable a person's user account if they'll no longer be using Clearspace.
- You can describe the organizational relationships between people using Clearspace so that this information is visible in the user interface.

Understanding Users and Groups

Generally speaking, when you add users and groups to Clearspace using the admin console, you're adding that data to the same database that Clearspace uses to store content. By default, even if your Clearspace instance uses an LDAP or Active Directory database (or some custom solution), the users you add through the admin console will be added to the Clearspace database and not the external data source. (For information on connecting an external LDAP or Active Directory system, see *Clearspace LDAP and Active Directory Guide*.)

A user account represents a person using Clearspace. Each user account has associated content, including the person's profile. For all users, you can use the console to change their user name and password, view and delete the content they've created, and view and edit their profile information. You can also disable a user, such as when they're no longer involved, but you want to hang on to their content.

Note that Clearspace handles guest users slightly differently. A guest user is someone who has access to Jive Service Cloud features such as the document sharing feature. A guest user creates an account via the cloud, but is listed in your user summary list. Because the user might be a guest to other instances of Clearspace (other companies, for example) using the same account, your disabling that user's account in your instance only removes their access to content in your instance. They'll still be able to log in to the service cloud.

A group account collects user accounts, typically in order to make it easier to grant all of the collected users certain permissions. For example, you might create a group of human resources workers so that you can give them (and only them) permission to view potentially sensitive information about employees in a "Benefits" space.

Adding Users and Groups

You can manually add new user and group accounts. When you go to add a user account, you'll enter basic information, including user name, "friendly" name, email address, and password. You'll also specify whether to send the new user a welcome email. (For more on the template a welcome email is create from, see *Managing Email Templates* in the Clearspace Administrator's Guide.)

Note: A user name may not contain any of the following characters: , / ? & #

By default, if your Clearspace instance uses LDAP or Active Directory to manage users, new user accounts you create from the admin console will go into the local Clearspace database (where content is stored). You will be able to edit user account properties for LDAP-managed users if your LDAP provider allows it (by default, it isn't allowed).

You might define the user groups you'll need before launching the space. For example, group users according to employee job function or department. User and Group permissions can be assigned on a space or sub-space basis.

Note that you can't add a *guest* user from the admin console. Currently, guest user accounts must be added by inviting the user from the user interface (such as from a shared document). That's because guest user accounts must currently be associated with a document.

Note: Clearspace doesn't currently support deleting user accounts. Disable the account instead.

Admin Console: People > Management > Create User

Admin Console: People > Management > Create Group

Editing User and Group Accounts

You can edit information included in a user or group account.

For people, you can also list and delete a person's content through the admin console. The User Summary page will list user accounts. You can also use the User Search page to find them (which is helpful if your list of users is very large). Once you've found the user account you want to edit, click the account name to view its properties. You can change profile information, password, even view and delete the person's content.

By default, if your Clearspace instance uses LDAP or Active Directory to manage user and group accounts, you won't be able to edit the account properties that the external database manages. At a minimum, this is the account name and password, but could include others as well. The properties you *can* edit are the ones stored in the local Clearspace database.

If your Clearspace instance has document sharing enabled, you'll be able to recognize guest user accounts (if any) through their account name. A guest user account name is the email address the user provided when they registered.

Admin Console: People > Management > User Summary > (Click the user account name)

Disabling User Accounts

When you want to remove access for a particular person but keep their content in the system, you can disable their account. When you disable someone's account, Clearspace will replace their former avatar with a special avatar that features a strikethrough; the word "Disabled" will appear on their profile. The person will no longer be able to log in or receive notifications, but their content will remain viewable in Clearspace.

Note that you can't currently delete a user account.

Admin Console: People > Management > User Summary > (Click the Disable button where the user account is listed)

Defining Organizational Relationships

You can define organizational relationships between people in your user database. The relationships you define will be visible in people's profiles. Click **Retire** to break the connection between two people.

People can also help to create the organization relationships using the end user interface. For example, a manager can add other people as direct reports through a link in each of those people's profiles.

Note: If your Clearspace instance draws data about people from an external data source such as and LDAP or Active Directory server, then organizational relationships might already be defined.

Admin Console: People > Management > Organizational Relationships