

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 services such as the document sharing feature. A guest user creates an account via the service, 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.

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.

Admin Console: People > Management > Create User

Admin Console: People > Management > Create Group

Moderating User Registration

If you've set up Clearspace to allow people to register on their own, you can moderate those new registrations. (A system administrator enables both user registration and moderation for new registration requests.)

When someone registers (usually by filling out the registration form defined by the system administrator), you'll get a chance to approve or decline their request. In the end user UI, click Your Stuff > Items Awaiting Approval. On the Pending Approvals tab of your profile, view the list of requests. You can click the person's name to view a profile page with the information they entered. Click Approve or Decline for each request. If you decline, you can enter your reason before finishing.

End User UI: Your Stuff > Items Awaiting Approval (admin profile's Pending Approvals tab)

Connecting to User Authentication Systems

Clearspace includes a database for storing data about people and groups you add. But you can use another system instead, including LDAP, Active Directory, or a custom system. You choose a user data system when you're setting up Clearspace with its setup tool; you can't specify or configure a system in the admin console.

You'll find a full guide for connecting to a user data system in the *Clearspace LDAP and Active Directory Guide*.

You can also set up Clearspace to synchronize data between its database and your external user database. On the **User Data Synchronization Settings** page, you can enable synchronization and set how synchronization is done. This feature helps you ensure that the local Clearspace database only contains data related to users

who are in your external (LDAP or Active Directory, for example) database. For example, you can disable the Clearspace account of a person whom your external database shows as no longer enabled.

Admin Console: People > Settings > User Data Synchronization Settings

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.

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

Defining User Relationships

You can define relationships between people in your user database. The relationships you define will be visible in people's profiles.

People can be part of two kinds of relationships:

- **organizational** relationships, such as a reporting relationship at work.
- **"friend"** or **"following"** relationships that they create themselves. (If you have approval of such relationships enabled, they're friend relationships; otherwise, they're following relationships.)

Depending on your user relationship settings, people can also help to create the 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.

Click **Retire** to break the connection between two people.

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 > User Relationships

Configuring User Appearance Options and Presence

Enabling Personalized Homepages

People can personalize the Clearspace home page using widgets. Widgets are designed to provide a custom view of content (and not necessarily content in Clearspace). If for some reason you want to disable the ability for people to make personalized homepages, you can do so on the Profile and Homepage page.

Admin Console: People > Settings > Profile and Homepage


Enabling Status Updates

When you enable status updates, you give people access to the Status Updates widget (for their personalized home pages), through which they can add status messages. A status message is a brief statement such as "Gladys is working on the quarterly results summary" or "Raoul is playing minesweeper."

Admin Console: People > Settings > Profile and Homepage


Defining Profile Templates

In Clearspace, user profiles are like other content in that they can be found on searches. Because of this, information that people give about themselves — including interests and areas of expertise — can be a great source of information for people looking to have a question answered. A person's profile can include biographical and professional information, along with links to content they've contributed.



Gladys Kravitz

Profile
 Gladys Kravitz's Stuff



Gladys Kravitz

Director
R&D

(503) 555-2998
gladys@example.com

Primary Address:
Portland,

Actions

- Send email
- Send private message
- Receive email notifications
- Member RSS Feed

Member Since: Feb 28, 2008
Phone Number: (503) 555-2998
Biography: Born and raised in Portland, I live with my husband and two kids in Sellwood.
Expertise: Finding stuff out, making stuff up. Plastics, textiles. Cross-country skiing, playing the lute.

Recent Activity

- Gladys Kravitz created **Mining the Market: A Research Manifesto** 4 minutes ago
- Gladys Kravitz created **Plans for the Next Big Thing** 13 minutes ago
- Gladys Kravitz created **Plans for the Next Big Thing** 6 days ago

Gladys Kravitz's Blogs

- [R and D Blog](#)
- [Gladys Kravitz's Blog](#)

Gladys Kravitz's direct reports











- [Betty Schmetty](#)
- [Raoul Esteban](#)

Organization

- [See Gladys Kravitz in the Reporting Structure](#)

You can customize the profile template, providing the fields that people will fill in with profile information. Clearspace includes several commonly used fields, but you can add your own as well. Also, if you allow people to register themselves, keep in mind that you can defined a form with a subset of these fields for a person to fill out when they register.

Default Profile Fields

Name	Type	Properties	Mapping
 Title	Text Field	Edit	N/A
 Department	Text Field	Edit	N/A
 Address	Address	Edit	N/A
 Phone Number	Phone Number	Edit	N/A
 URL	URL	Edit	N/A
 Hire Date	Date/Time	Edit	N/A
 Biography	Large Text Field	Edit	N/A
 Expertise	Large Text Field	Edit	N/A
 Alternate Email	Email	Edit	N/A
 Home Address	Address	Edit	N/A

Custom Profile Fields

[New Field](#)

Name	Type	Properties	Options	Mapping	Order	
No custom profile fields defined.						
						<input type="button" value="Delete"/>

Admin Console: People > Settings > Profile and Homepage