



Managing CMX Engage Users and Accounts

This chapter explains the various types of the CMX Engage users. It also describes how to manage the CMX Engage and CUWN accounts.

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Managing the CMX Engage Users

The CMX Engage provides its users different rights and privileges based on the role they perform.

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Inviting a CMX Engage User

The Account Admin user can add other users for the CMX Engage, and grant the users the required admin rights. The users can be created for a particular location. The CMX Engage enables you to define the following types of users:

- **Account Admin**—This user has complete administrative rights on the CMX Engage dashboard.
- **Admin**—This user has all the privileges except user management on the specified location. For example, an admin user cannot invite a user to join the CMX Engage.
- **Portal Designer**—This user has the access only to the Portal features of the CMX Engage on the portals.
- **AccessCode Manager**—This user has the access only to create and manage access codes for the locations for which access rights are provided. This role is not applicable if your wireless network is CUWN.
- **Location Manager**—This user has the access only to the portals, location metadata, and reports for the locations for which access rights are provided. This role is not applicable if your wireless network is CUWN.
- **Read Only Access**—This user has the access only to view the CMX Engage dashboard for the specified location. That is, this user cannot edit the CMX Engage configurations.

To add a CMX Engage user, perform the following steps:

Step 1 In the CMX Engage dashboard, choose **Team**.

Step 2 Click **Invite a User**.

Step 3 In the Invite a User window, enter the following details:

- a. In the Email field, enter the e-mail address of the user to add.
- b. From the Privileges drop-down list, choose the access type that you want to provide to this user.

Based on your selection, an option to specify locations appear. The field is not displayed for Account Admin, and Portal designer.

- If you choose Admin, Read Only Access, or Access Code Manager, the Choose Location button appears. Select the locations for which you want to provide access, and click **Done**.



Note For AccessCode Manager, only the network locations will be available for selection.

- If you choose Location Manager, additional fields required for inviting the location manager appears. For more information, see [“Creating a Location Manager” section on page 14-8](#)

- c. Click **Send Invitation**.



Note The Invite a User button is available only for the Account Admin users.



Note The AccessCode Manager option appears only if any experience zone exists for your CMX Engage account.

Editing the User Privileges

The CMX Engage enables you to change the privileges of an existing CMX Engage user. For example, an account admin user can promote a portal user to an admin user.

To change the user privileges of a CMX Engage user, perform the following steps:

Step 1 In the CMX Engage dashboard, choose **Team**.

The Team page appears with the list of the CMX Engage users.

Step 2 Click the user for whom you want to change the user privileges.

The Edit Privileges window appears.

Step 3 From the Privileges drop-down list, choose the type of access that you want to provide to the user.

Step 4 If you choose “Admin”, “Read Only Access”, “Location Manager”, or “AccessCode Manager”, from the Choose Location drop-down list that appears, select the locations for which you want to provide access to the user.

Step 5 Click **Save**.

**Note**

An e-mail is sent to the user indicating the change in the user privileges.

**Note**

The AccessCode Manager option appears only if any experience zone exists for your CMX Engage account. This role is not applicable if your wireless network is CUWN.

Deleting a CMX Engage User

If a user no more needs access to the CMX Engage, we recommend that such users to be deleted from the CMX Engage user list.

To delete an existing CMX Engage user, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Team**.
The Team page appears with the list of the CMX Engage users.
- Step 2** Select the check box adjacent to the user that you want to delete.
- Step 3** Click **Delete User** at the far right of that user ID.
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Searching for a CMX Engage User

The CMX Engage provides a search feature using which you can search for the CMX Engage users.

To search for an existing CMX Engage user, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Team**.
The Team page appears with the list of the CMX Engage users.
- Step 2** Click the **Search** icon.
- Step 3** In the Search field, enter the e-mail ID of the user whom you want to search.
The CMX Engage users list gets shortened with the name that matches the one specified in the Search field.
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Managing the CMX Engage Accounts

This section describes how to manage the CMX Engage Accounts.

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Changing the CMX Engage Password

We recommend you to change the CMX Engage password at frequent intervals to ensure more security for your application.

To change the password of your CMX Engage account, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click the User Account icon that appears in the left pane.
- Step 2** Click **Change Password**.
- Step 3** In the window that appears, do the following:
- In the Current Password text field, enter the current password for your CMX Engage account.
 - In the New Password field, enter the new password that you want for your CMX Engage account.
 - In the Confirm Password field, reenter the new password for confirmation.
 - Click **Change Password**.
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Note The strength required for the password is 8. Increase the security of your password by adding special characters and numbers in the password.

Signing Out of CMX Engage

To sign out of the CMX Engage, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click the User Account icon that appears in the left pane.
- Step 2** Click **Sign out**.
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