



Managing Users and Accounts

This chapter explains the various types of the CMX Engage users. It also describes how to manage the CMX Engage and Meraki 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.
- **Location Manager**—This user has the access only to the portals, location metadata, and reports for the locations for which access rights are provided.
- **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:

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- Step 1** In the CMX Engage dashboard, choose **Team**.
- Step 2** Click **Invite User**.
- Step 3** In the Invite Users window, enter the following details:
- a. In the Email Address field, enter the e-mail address of the user to add.
 - b. From the Privileges drop-down list, choose the access type to provide to this user.
Based on your selection, an additional field appears. The field is not displayed for Account Admin, and Portal designer.
 - If you choose Admin or Read Only Access, the Choose Location button appears. Select the locations for which you want to provide access, and click **Done**.
 - If you choose AccessCodeManager, the Choose Location button appears. Select the locations for which you want to provide access, and click **Done**.
 - If you choose Location Manager, the Location area appears where you have to specify the locations for which the location manager must have access rights.
 - If you want to specify the access rights to existing locations, click **Choose Locations** and specify the locations for which you want to provide access to the location manager.
 - If you want to create a new location for the location manager, click **Create New Location**. In the Create New Location window that appears, enter a name for the location, and select the organization under which the location is to be created. Click **Done**.
 - c. Click **Send Invite**.
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Note The Invite 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 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 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 you want to provide to the user.
- If you choose “Admin”, “AccessCode Manager”, or “Read Only Access”, from the Choose Location drop-down list that appears, select the locations for which you want to provide access to the user.

- If you choose Location Manager, the Location area appears where you have to specify the locations for which the location manager must have access rights.
 - If you want to specify the access rights to existing locations, click **Choose Locations** and specify the locations for which you want to provide access to the location manager.
 - If you want to create a new location for the location manager. click **Create New Location**. In the Create New Location window that appears, enter a name for the location, and select the organization under which the location is to be created. Click **Done**.

Step 4 Click **Apply Changes**.



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.

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.
The Delete User button appears.
- Step 3** Click **Delete User**.
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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.

Managing the CMX Engage Accounts

This section describes how to manage the CMX Engage Accounts.

- [Changing the CMX Engage Password, page 13-4](#)
- [Signing Out of CMX Engage, page 13-4](#)

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 drop-down arrow for 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:
- a. In the Current Password text field, enter the current password for your CMX Engage account.
 - b. In the New Password field, enter the new password that you want for your CMX Engage account.
 - c. In the Confirm Password field, reenter the new password for confirmation.
 - d. 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 drop-down arrow for the user account icon that appears in the left pane.

Step 2 Click **Sign out**.

Managing the Meraki Account

To use the CMX Engage with Meraki, you must have a Meraki account. This section provides information on how to manage the Meraki account.

- [Connecting to a Meraki Account, page 13-5](#)
- [Connecting to a Different Meraki Account, page 13-5](#)

Connecting to a Meraki Account

To connect to a Meraki account, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click the Wi-Fi icon that appears in the left pane.
- Step 2** Click **Connect account**.
- Step 3** In the Enter new Meraki credentials window that appears, enter the username, and password for your Meraki account.
- Step 4** Click **Connect Account**.
- Step 5** In the Connect account window that appears, click **Continue**.
- The CMX Engage is now connected to the Meraki account specified.
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Connecting to a Different Meraki Account

The CMX Engage enables you to connect to a different Meraki account. You can use this option to connect to a different Meraki account, when you want to import access points from multiple Meraki accounts.

To connect to a different Meraki account, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click the Wi-Fi icon that appears in the left pane.
- Step 2** In the dialog box that appears, click **Meraki Account Settings**.
- The Meraki Settings window appears.
- Step 3** Click **Disconnect**.
- Step 4** Click **Confirm**.
- The message “Your Meraki account has been successfully disconnected” appears in the Meraki Account Settings window.
- Step 5** Enter the log in credentials of the Meraki account to which you want to switch your connection.
- Step 6** Click **Connect Account**.
- Step 7** In the Connect Account screen that appears, click **Continue**.

The CMX Engage is now connected to the Meraki account specified.