User Management in Resource Manager

This section describes how to manage user profiles. Topics in this section include:

- Overview of User Management, page 8-1
- Using User Management, page 8-1

Overview of User Management

In Resource Manager you can manage users as individuals or in groups. Management includes creation and modification of the user profile, as well as definition of which resources are accessible to the user.

Before Configuring Users

Defaults should be set before performing user management. Defaults are set by the Organization Administrator. Each user type has a default set of user privileges.

In Admin > Advanced Settings, on the Default User Settings tab, you can set default values for user settings.

Using User Management

Accessing User Management

To access the User Management section, in the Admin sidebar, click **User Management**. The **User Management** window opens by default on the Users tab.

Using the Users Tab

Settings for management of individual users in Resource Manager are configured on the Users tab.

Updating the Users List

Procedure

Step 1   In the User Management section, click the **Users** tab.

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> **Note**   During the organization account creation process, Resource Manager registers only the first user (the technical contact). The technical contact is automatically assigned an Organization Administrator user type, allowing the technical contact to log in and provision the rest of the users. You cannot delete the technical contact via Resource Manager, and you should not delete the technical contact from the directory server.

Step 2   If an organization uses its directory server to provision users, an Update button is displayed not an Add button. In this case, click **Update** to import an up-to-date list of users.

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> **Note**   The importing is done in the background enabling administrators to continue working with the system.

A user type is automatically assigned to each user based on settings in Admin > Advanced Settings > Default User Settings. If an external directory server is used, the settings in the configuration file of the directory server determine the user type. If no user type is defined, the user is automatically assigned the Meeting Organizer user type. User Type settings configured in the Advanced Settings > Default User Settings tab are not applied to users retrieved from an external directory server.

Adding Users

You can only add a user if Resource Manager does not use an LDAP server to provision its users.

Procedure

Step 1   To add users to the Users tab list, on the Users tab, click **Add**.

The Add User window appears in which you can provide user details.

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> **Note**   Information you provide in the User Profile window is about the user. For example, phone numbers are those of the user.

Step 2   In the User ID field, enter a login ID according to organization protocol.

Step 3   In the Password field, enter a password for the user.

Step 4   In the Confirm Password field, confirm the user password.

Step 5   From the User Type list, select a user type (Regular User**,** Meeting Organizer or Organization Administrator).

Step 6   In the E-mail field, enter an e-mail address for the user to receive meeting notifications.

Step 7   From the Groups list, select the group to which the user belongs.

Step 8   From the Default Time Zones list, enter the default time zone for the user. Local time zones are used by default in User > My Meetings and User > All Meetings.

Step 9   When all fields are completed as per your requirements, click **OK**.

The user profile is saved and an e-mail notification that includes Resource Manager account information is sent to the user.

Modifying a User Profile

User settings can be modified in the User Profile window by an Organization Administrator if the Resource Manager database is used for user storage. When synchronized with the directory server, only the settings stored in the Resource Manager can be modified. Users can change password, e-mail, telephone and time zone settings in the Users > My Profile section, if those settings are not stored in the directory server.

Procedure

Step 1   If you want to modify the details of a user profile, in the Users window, in the Name column, click the name of the user.

The User Profile window opens in which you can modify user details.

Step 2   Modify the user profile details as you require.

Step 3   The Locked checkbox indicates whether or not a user account is locked and future login attempts are not allowed. To prevent a meeting operator, meeting organizer, or regular user from accessing the system, choose **Locked**. To allow login access for these user types, clear the **Locked** checkbox.

Step 4   When all fields are completed as per your requirements, click **OK**.

The user profile is saved and an e-mail notification that includes Resource Manager account information is sent to the user.

Step 5   Click **OK**.

Tip   It is important to update the Users list in Resource Manager if users are deleted from the directory server that is currently in use. Meeting creation and meeting scheduling issues may arise if an update is not performed.

Note   When retrieving user information from directory server databases, the Resource Manager performs the importing process in the background, enabling administrators to continue working with the system. Once the user database is created, users log in to the Resource Manager using a directory server login ID and password.

When using iPlanet or Sun ONE Directory Server to provision the Resource Manager, it is possible that identical user login IDs may exist in different organization units (ou). When this is the case, search base information must be provided as part of the login. For example, "uid=dsmith,ou=groups" or "uid=dsmith,ou=people".

Deleting a User Profile

To can delete a user profile, in the User Profile window, click **Delete**. The following points should be noted:

- Delete is disabled if you are provisioning users via a directory server.

- You cannot delete a user participating in an in-session meeting until the user has left the meeting.

- The last user with Organization Administrator privileges may not be deleted.

Using the Groups Tab

On the Groups tab, you can view, add, and modify the definition of groups.

Configuring a Group

Procedure

Step 1   In the User Management section, click the Groups tab.

Step 2   Click **Add** to add a new user group or click the group name to modify an existing group.

Step 3   In the Name field, enter a name for the group.

Step 4   Choose participants and terminals from **Available Contacts,** and then click the right-arrow button to move them to Selected Contacts.

Step 5   Click **OK**.

The group appears in the Groups tab list.

Configuring an LDAP Server

After login, you can configure the LDAP synchronization settings.

Procedure

Step 1   Go to Admin > Advanced Settings > LDAP Settings.

Step 2   To configure the LDAP server connection, set the following attributes:

- On the Directory Server Type field, select the type of LDAP server to connect Resource Manager to support ADS and iPlanet.

- Enter the URL, login ID, and password of the LDAP server in the URL, Login ID, and Password fields respectively.

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- Enter the organization domain in LDAP Server Domain.

- Enter search strings in LDAP Search Base. Search conditions include "ou" and "cn" for example.

Step 3   Click **Advanced** to assign LDAP users to different user roles in Resource Manager. There are four user roles to which an LDAP user can map:

- Organization Administrator

- Meeting Operator

- Meeting Organizer

- Regular User

- By default, all users are assigned the Organization Administrator user role.

Note   In LDAP Settings, you can define how frequently user records are synchronized.