



Managing Users

This section describes how to manage users on your system.

- [About Managing Users, page 1](#)
- [Adding Users, page 2](#)
- [Editing Users, page 2](#)
- [Activating Users, page 3](#)
- [Deactivating Users, page 3](#)
- [About Comma- and Tab-Delimited Files, page 4](#)
- [Importing Users, page 8](#)
- [Exporting Users, page 9](#)
- [Importing Users to a New System by Using an Exported File, page 9](#)
- [Configuring Tracking Codes, page 10](#)
- [Emailing Users, page 11](#)

About Managing Users

You can add users individually or import lists of users stored in a comma- or tab-delimited file.

You can add and deactivate user accounts but you cannot delete them. Deactivation enables you to make a user inactive but provides the ability to reactivate the user later if necessary. Reactivated user accounts regain access to meetings, recordings, and other data that they had access to before they were deactivated.

The system supports a lifetime maximum of 400,000 user accounts. This number represents the total of both active and deactivated user accounts. This lifetime maximum number is large enough to accommodate expected growth in the user database.

To prevent unauthorized sign-in to the system, make sure to deactivate any users who leave your organization. You can deactivate users in the following ways:

- If your system does not use integrated SSO you can deactivate users individually or by importing a comma- or tab-delimited file with the ACTIVE field set to N for each user you want to deactivate. See

[Deactivating Users](#), on page 3 and [About Comma- and Tab-Delimited Files](#), on page 4 for more information.

- If your system uses integrated SSO you must deactivate users by removing them from the corporate directory in your SAML 2.0 IdP. This procedure is not performed by this product.
- Use the password configuration feature to deactivate users after a specified period of time. See [Configuring Your General Password Settings](#) for more information.

Adding Users

Procedure

- Step 1** Sign in to the Administration site.
- Step 2** Select **Users > Add User**.
- Step 3** Select your account type (**Host** or **Administrator**).
- Step 4** Complete the fields with the user's information. Fields marked with an asterisk are required.
- Step 5** Select **Save**.
The user is added to your system.
-

Editing Users

You can change user information and activate or deactivate user accounts with the edit user feature.

Procedure

- Step 1** Sign in to the Administration site.
- Step 2** Select **Users**.
The list of users appears. The default number of users shown on each page is 50. You can optionally select the **Users Per Page** drop-down menu and change the setting to **50** or **100**.
- Step 3** Select a user to edit.
- Step 4** Make changes to the editable fields. Fields marked with an asterisk are required.
- Step 5** Optionally select the **Force this user to change password on next login** check box.
Note If SSO is enabled on your system, this feature does not apply to host accounts.
- Step 6** Optionally activate or deactivate an account:
- Select **Activate** to reactivate an inactive account.
 - Select **Deactivate** to deactivate an account.
- Note** Activating or deactivating an account does not save any other changes you have made to the account. You must select **Save** to save your changes.

Step 7 Select **Save**. This saves your changes without altering the status of the account.

Activating Users

After you add or import host and administrator accounts, they are active by default. Use this feature to reactivate inactive users.

Alternatively you can activate an account on the **Edit User** page. See [Editing Users, on page 2](#) for more information.

Procedure

- Step 1** Sign in to the Administration site.
 - Step 2** Select **Users**.
 - Step 3** Select the check boxes for any inactive users you want to activate.
 - Step 4** Select **Actions** > **Activate**.
The selected accounts are activated and the status for each account should now be "Active."
-

Deactivating Users

You can deactivate host and administrator accounts. Deactivating an account prevents the owner of the accounts from doing the following:

- Signing in from web pages, the Outlook plugin, and mobile applications
- Hosting or attending meetings
- Managing the system (if the user was an administrator)

Alternatively you can deactivate an account on the **Edit User** page. See [Editing Users, on page 2](#) for more information.



Note Administrators cannot deactivate their own accounts.

Procedure

- Step 1** Sign in to the Administration site.
- Step 2** Select **Users**.
- Step 3** Select the check boxes for any active users you want to deactivate.
- Step 4** Select **Actions** > **Deactivate** and confirm by selecting **OK**.

The selected accounts are deactivated and the status for each account should now be "Inactive."

About Comma- and Tab-Delimited Files

Use a spreadsheet application such as Microsoft Excel to organize your user data. Save or export your spreadsheet as a comma- or tab-delimited file. Your system supports UCS Transformation Format—8 bit (UTF-8). The characters you enter in your file are limited to those specified in UTF-8. If your file contains non-ASCII characters, verify that it uses a unicode comma or tab delimiter.

Include the following fields in your comma- or tab-delimited file:

- USERID—The user ID.



Note This field is automatically generated by the system and must be left blank when performing imports.

- ACTIVE—Whether or not this user is active. Enter **Y** or **N** (Required).
- FIRSTNAME—User's first name. (Required)
- LASTNAME—User's last name. (Required)
- EMAIL—User's email address. (Required)
- LANGUAGE—Language of the user. See [Setting Import File Field Values, on page 5](#) for more information.
- HOSTPRIV—Host privileges. Enter **ADMN** or **HOST**.
- TIMEZONE—Time zone in which the user is located. See [Setting Import File Field Values, on page 5](#) for more information.
- DIVISION—User's division. For tracking code group 1. This field is configurable on the **Tracking Codes** page. See [Configuring Tracking Codes, on page 10](#) for more information.
- DEPARTMENT—User's department. For tracking code group 2. This field is configurable on the **Tracking Codes** page. See [Configuring Tracking Codes, on page 10](#) for more information.
- PROJECT—User's project. For tracking code group 3. This field is configurable on the **Tracking Codes** page. See [Configuring Tracking Codes, on page 10](#) for more information.
- OTHER—Other information. For tracking code group 4. This field is configurable on the **Tracking Codes** page. See [Configuring Tracking Codes, on page 10](#) for more information.
- CUSTOM5—Custom field 5.
- CUSTOM6—Custom field 6.
- CUSTOM7—Custom field 7.
- CUSTOM8—Custom field 8.
- CUSTOM9—Custom field 9.

- CUSTOM10—Custom field 10.

Setting Import File Field Values

Language Field Values

Following are the country code field values that you can set in your import file.

Field Value	Language
en-us	U.S. English
en-uk	U.K.English
zh-cn	Simplified Chinese
zh-tw	Traditional Chinese
jp	Japanese
ko	Korean
fr	French
de	German
it	Italian
es-me	Castilian Spanish
es	Latin American Spanish
nl	Dutch
pt-br	Portuguese
ru	Russian

Time Zone Field Values

Following are the time zone field values that you can set in your import file.

Field Value	GMT	Location
Dateline	-12 hr	Marshall Islands
Samoa	-11 hr	Samoa
Hawaii	-10 hr	Honolulu

Field Value	GMT	Location
Alaska	-9 hr	Anchorage
Pacific	-8 hr	San Francisco
Mountain	-7 hr	Arizona
Mountain	-7 hr	Denver
Central	-6 hr	Chicago
Mexico Central	-6 hr	Mexico City
Central	-6 hr	Saskatchewan
S. American Pacific	-5 hr	Bogota
Eastern	-5 hr	New York
Eastern	-5 hr	Indiana
Atlantic	-4 hr	Halifax
S. American Western	-4 hr	Caracas
Newfoundland	-3.5 hr	Newfoundland
S. American Eastern	-3 hr	Brasilia
S. American Eastern	-3 hr	Buenos Aires
Mid-Atlantic	-2 hr	Mid-Atlantic
Azores	-1 hr	Azores
Greenwich	0 hr	Casablanca
Greenwich Mean	0 hr	London
Central European	1 hr	Amsterdam
Central European	1 hr	Paris
Central European	1 hr	Berlin
Eastern European	2 hr	Athens
Egypt	2 hr	Cairo

Field Value	GMT	Location
South Africa	2 hr	Pretoria
Eastern European	2 hr	Helsinki
Israel	2 hr	Tel Aviv
Saudi Arabia	3 hr	Riyadh
Russia	3 hr	Moscow
Nairobi	3 hr	Nairobi
Iran	3.5 hr	Tehran
Arabian	4 hr	Abu Dhabi
Baku	4 hr	Baku
Afghanistan	4.5 hr	Kabul
West Asia	5 hr	Ekaterinburg
Ekaterinburg	5 hr	Islamabad
India	5.5 hr	Bombay
Colombo	5.5 hr	Colombo
Central Asia	6 hr	Almaty
Bangkok	7 hr	Bangkok
China	8 hr	Beijing
Australia Western	8 hr	Perth
Singapore	8 hr	Singapore
Taipei	8 hr	Taipei
Japan	9 hr	Tokyo
Korea	9 hr	Seoul
Yakutsk	9 hr	Yakutsk
Australia Central	9.5 hr	Adelaide

Field Value	GMT	Location
Australia Central	9.5 hr	Darwin
Australia Eastern	10 hr	Brisbane
Australia Eastern	10 hr	Sydney
West Pacific	10 hr	Guam
Tasmania	10 hr	Hobart
Vladivostok	10 hr	Vladivostok
Central Pacific	11 hr	Solomon Islands
New Zealand	12 hr	Wellington
Fiji	12 hr	Fiji
Central European	1 hr	Stockholm
Mexico Pacific	-8 hr	Tijuana
Mexico Mountain	-7 hr	Chihuahua
S. America Western	-4.5 hr	Caracas
Malaysia	8 hr	Kuala Lumpur

Importing Users

Before You Begin

Prepare a comma- or tab-delimited file containing your users' information. See [About Comma- and Tab-Delimited Files](#), on page 4 for more information.

Procedure

-
- Step 1** Sign in to the Administration site.
- Step 2** Select **Users > Import/Export Users**.
The Import/Export Users page appears.
- Step 3** Select **Import**.

The Import Users page appears.

- Step 4** Select **Browse** and then select the comma- or tab-delimited file that you want to import.
 - Step 5** Select the **Tab** or **Comma** radio button to indicate which type you are importing.
 - Step 6** Select **Import**.
Your file is imported. After the import is complete, the system sends an email indicating how many records were imported successfully and how many failed.
-

What to Do Next

Select **Users** to see the users on your system. Make sure your users were imported properly.

Exporting Users

Procedure

- Step 1** Sign in to the Administration site.
 - Step 2** Select **Users > Import/Export Users**.
 - Step 3** Select **Export**.
Your user data is exported as a CSV file. The system emails the administrator with a link to download the exported file.
-

Importing Users to a New System by Using an Exported File

Perform the following steps to import users to a new system using an exported file.

Procedure

- Step 1** Sign in to the Administration site on the system you want to export users from.
- Step 2** Select **Users > Import/Export Users**.
- Step 3** Select **Export**.
Your user data is exported as a comma- or tab-delimited file.
- Step 4** Open the exported file, delete all USERIDs from the file, and resave the file.
- Step 5** Sign in to the Administration site on the system to which you want to import users.
- Step 6** Select **Users > Import/Export Users**.
The Import/Export Users page appears.
- Step 7** Select **Import**.

The Import Users page appears.

- Step 8** Select **Browse** and then select the file you exported above.
- Step 9** Select the **Tab** or **Comma** radio button to indicate which type you are importing.
- Step 10** Select **Import**.
Your file is imported. After the import is complete, the system sends an email indicating how many records were imported successfully and how many failed.

What to Do Next

Select **Users** to see the users on your system. Make sure your users were imported properly.

Configuring Tracking Codes

You can configure tracking codes to track host usage in specified groups. For example, you can configure tracking codes for projects or departments. The tracking codes you configure appear as options when you add or edit users.

You must configure the following for each tracking code:

- Tracking code group—Configure your tracking code groups. Tracking code groups are used when you add and edit users. The defaults are Division, Department, Project, Other, and Custom5 through Custom10.
- Input mode—Select **Text field** or **Dropdown menu**.
- Usage—Select **Not used**, **Optional**, or **Required**.

Procedure

-
- Step 1** Sign in to the Administration site.
- Step 2** Select **Users > Tracking Codes**.
- Step 3** Optionally enter the name of each tracking group you want to configure in the **Tracking code group** column. You do not need to change any of the fields if you intend to use the default values.
- Step 4** Select **Text Input** or **Dropdown Menu** in the **Input mode** column for each tracking code.
If you select **Text Input** then you enter your tracking code name in a text field. If you select **Dropdown menu** an **Edit list** link appears next to your **Input mode** field. Select the **Edit list** link to configure the values in the dropdown menu for that tracking code. See [Editing Tracking Codes, on page 11](#) for more information.
- Note** If you select **Dropdown menu** for one of your tracking code groups, you must select **Edit list** and enter one or more options for the associated dropdown menu.
- Step 5** Select **Not used**, **Optional**, or **Required** in the **Usage** column for each tracking code.
- Note** You should only change the Usage to **Required** or **Optional** after you have configured a dropdown menu list. An error message appears if you attempt to configure a usage setting other than **Not used** if you have not configured the Tracking code group and Input mode first.
- Step 6** Select **Save**.
Your tracking code settings are saved.
-

Editing Tracking Codes

By default, tracking codes are displayed as text boxes. If you want to display tracking code options in a dropdown menu you must configure a list of options. After you select **Dropdown menu** from the **Input mode** dropdown menu, an **Edit list** link appears.

Before You Begin

To edit your tracking codes you must select **Users > Tracking Codes** and select **Dropdown menu** for your **Input mode**.

Procedure

-
- Step 1** Select the **Edit list** link.
The **Edit Tracking Code List** dialog box appears.
- Step 2** Configure the fields in the **Edit Tracking Codes List** dialog box.
- a) Select **Show active codes only** to display only active tracking codes when you open this dialog box. Deselect this option to show all tracking codes. Note that you cannot select this option the first time you configure tracking codes for each **Input mode**.
 - b) Select **Go to first empty tracking code** to go to the first page with empty code fields.
 - c) **Active** is selected by default. You can uncheck **Active** to make a tracking code inactive. Inactive tracking codes do not appear on this tracking code group's dropdown menu. Check **Active** to activate an inactive tracking code.
 - d) Enter the menu item name in the **Code** text box. Limit: 128 characters.
 - e) Select the **Default** radio button to make this menu item the default selection for the dropdown menu.
 - f) Select **Add 20 more lines** to add 20 more configurable tracking code lines. Navigation links (**Next**, **Previous**, and page numbers) are added if you have more than 20 lines to display. Limit: 500 lines (25 pages).
 - g) Select a **Sort** radio button to set the sorting method (**Do not sort**, **Sort ascending**, **Sort descending**) for the tracking codes. Note that **Sort** only works for the current page.
- Step 3** Select **Update** to save your settings.
Your settings are saved and the **Edit Tracking Code List** page closes.
-

Emailing Users

Use this tool to send email to your users.

Procedure

- Step 1** Sign in to the Administration site.
- Step 2** Select **Users > Email Users**.
- Step 3** Enter a user's email address or an email alias you want to email in the **To** text box.
The **To** field is optional for 50-user and 250-user deployments, and required for 800-user and 2,000-users deployments. If you do not specify a recipient, the email is sent to the first administrator configured on the system.
- Step 4** Optionally enter email addresses in the **BCC** text box.
- Step 5** Enter your subject in the **Subject** text field.
- Step 6** Enter your message in the **Message** box.
- Step 7** Select **Send**.
-