Create Users for Cloud Deployment

Create Users Workflow

Webex Administration Tool provides a number of ways to create users for your organization.

Procedure

	Command or Action	Purpose
Step 1	Create users in Webex Administration Tool using one of the following methods: • You can add users individually using the WebexAdministration Tool. Create New Users, on page 2 • You can generate an email invitation for users to self register for a Webex account. User Provisioning Information, on page 2 • Create and import a CSV file with your users information. Create and Import a CSV File, on page 4	
Step 2	Assign users to policy groups. Assign Users to Policies, on page 6	

Create New Users

Procedure

Step 1 To create a new user or administrator, select the **User tab** > **Add**.

Step 2 Enter information in each field. The default Role is User (non-administrator).

> **Note** The Business Email is the Username. You cannot edit the Username.

Step 3 (Optional) Select the **Policy Group Assignment** tab to assign a policy group to the user.

Step 4 If IM Archiving is enabled for your Webex Messenger Organization, the **Archive IMs** check box is displayed on the **Add User** dialog box. To log IMs for this user for archival, select the **Archive IMs** check box.

Step 5 To change the endpoint, select a different endpoint from the drop down list.
Selecting **Default** assigns the user to the endpoint preconfigured as the default endpoint in the **IM Archiving** screen.

Step 6 To assign this user to an upgrade site, select a site from the **Upgrade Site** drop-down list.

Step 7 If your Webex Messenger Organization is enabled with Cisco Unified Communications, the Unified Communications tab is displayed on the Add User dialog box. Select the **Unified Communications** tab to view the settings available for Cisco Unified Communications.

Step 8 Under **Cluster**, select the applicable Cisco Unified Communications cluster to which you want to add this user.

Step 9 If your Webex Messenger Organization is enabled with Webex Meeting Center integration, the Add User dialog box is displayed. To assign the Organization Administrator role to the user, select the **Organization Administrator** check box.

> **Note** • If you have enabled **Automatically enable Meeting account when creating a new user** in the **Meetings** page, the **Meeting Account** check box is selected by default. In such a case, you cannot clear the Meeting Account check box.
>
> • When the **Meeting Account** check box is selected, it means a corresponding Webex Meeting Center account is created for this user.

Step 10 Select **Save.**

New users receive a welcome email based on the Welcome Email template in WebexMessenger Administration Tool.

Step 11 Repeat the previous steps to continue adding new users.

User Provisioning Information

User provisioning includes specifying user-provisioning information such as registration, and fields required when creating a user's profile. The settings you make here impact when users are provisioned in your Webex Messenger Organization. For example, if you set specific fields as mandatory here, the user needs to compulsorily fill in those fields when creating the user profile.

Webex Messenger customers can enable self-registration when there is no SAML or Directory Integration enabled. In such a case, the Organization Administrator does not need to specify the registration URL. When registration is not enabled, customers can specify a custom web page. Any user trying to register with an email address that matches with customer's domain is redirected to the custom web page. Customers can use this webpage to display information about their internal processes required for creating a new Webex Messenger account.

For example:

```
To obtain the Cisco Webex Messenger service, send an email to
ithelpdesk@mycompany.com, or call +1 800 555 5555.
```

Enter User Provisioning Information

Procedure

Step 1   To enter user provisioning information, under the **Configuration** tab select **System Settings** > **User Provisioning**.

Step 2   To enable users to self-register for an account with the Cisco Jabber application, select **Enable user self-registration using** Webex **registration page**.

The URL for the self-registration page is www.webex.com/go/wc. The Webex Messenger organization Administrator typically provides this URL.

| **Note** | If you do not select Enable user self-registration using Webex registration page, the Custom Registration URL field and the Custom Message box is displayed. In this case, you will need to enter the URL for the custom user registration page. |

Step 3   In the **Custom Registration URL** field, enter the URL of the customized self-registration page.

If you do not enter a custom URL, the following self-registration page (default) URL is displayed: www.webex.com/go/wc.

Step 4   In the **Custom Message** box, enter a description for the custom self-registration page.

Step 5   To notify the Organization Administrator via email each time a user registers using the self-registration page, select **Send notification to Administrator when users self register using Cisco Webex registration page**.

Step 6   Under **Set mandatory fields for user profile**, select the fields that are compulsorily displayed each time a user's profile is created or viewed. These fields always appear each time you:

- create a new user

- edit an existing user profile

- import users from a CSV file

Step 7   Select **Save**.

Create and Import a CSV File

You can easily import a large number of users from a comma separated values (CSV) file into your Webex Messenger organization. Similarly, you can export your users to a CSV file. Importing is a useful way of painlessly adding a large number of users to your organization thereby saving the effort of manually adding each user.

After the import is complete, the Organization Administrator who initiated the import receives an email with the status of the import. The email states whether the import was a success, failure, or terminated.

The CSV file is imported and the users appear in the **User** tab.

CSV Fields

Note: Organization Administrators and User Administrators cannot be created using the CSV Import process.

The following fields (in no specific order) should be included in the CSV file prior to importing users into Webex. Some fields are mandatory, you must enter information into them, and some are optional.

Note: If you do not want to enter information into a field, you can enter the character "-" and it is imported into the database as an empty field. You can only do this for optional fields. If you input "-" in a mandatory field, an error is reported on import. Do not use the value N/A.

Field Name	Description
employeeID	*Mandatory (only SSO enabled)* Enter the user's ID.
displayName	*Optional* Enter the user's display name.
firstName	*Mandatory* Enter the user's first name.
lastName	*Mandatory* Enter the user's last name.
email	*Mandatory* Enter the user's email address.
userName	*Mandatory* Enter the user's username in the user@email.com format.
jobTitle	*Optional* Enter the user's job title or designation.
address1	*Optional* Enter the first line of the user's address. The Organization Adm
address2	*Optional* Enter the second line of the user's address. The Organization A
city	*Optional* Enter the city in which the user lives. The Organization Admin
state	*Optional* Enter the state in which the user lives. The Organization Admi
zipCode	*Optional* Enter the user's ZIP code. The Organization Administrator can
ISOcountry	*Optional* Enter the two letter country code, for example IN, US, CN, in v http://www.iso.org/iso/country_codes/iso_3166_code_lists/ country_nan configure this field so that it is mandatory for users.

Field Name	Description
phoneBusinessISOCountry	*Optional* Enter the country code, for example IN, US, CN, for the us... this field so that it is mandatory for users.
phoneBusinessNumber	*Optional* Enter the user's business phone number. The Organization A...
phoneMobileISOCountry	*Optional* Enter the country code, for example IN, US, CN, for the us... this field so that it is mandatory for users.
phoneMobileNumber	*Optional* Enter the user's mobile phone number. The Organization A...
fax	*Optional* Enter the user's fax number.
policyGroupName	*Optional* Enter the default policy group to which the user belongs.
userProfilePhotoURL	*Optional* Enter the URL where the user's profile picture can be acces...
activeConnect	*Optional* Indicate whether the user's status is **active** in Webex Enter ...
center	*Optional* Used to assign (Yes) or remove (No) the center account for ...
storageAllocated	*Optional* Enter the storage allocated to the user in Megabytes. This must be a numerical value
CUCMClusterName	*Optional* Enter the name of the Cisco Unified Communications Mana...
businessUnit	*Optional* Enter the business unit or department of the user. The Orga... users.
IMLoggingEnable	*Optional* Indicate if IM logging is enabled for this user. Enter **True** t...
endpointName	*Optional* Enter the endpoint name configured for logging IMs.
autoUpgradeSiteName	*Optional* Enter the upgrade site name.

Note You can use tab, or comma-separated CSV files. Ensure that your CSV file is encoded in either UTF-8 or UTF16-LE formats.

Select UTF-8 as the Encoding Format

Procedure

Step 1 In Microsoft Excel select **File > Save As**.

Step 2 In the **Save As** dialog box, select **Tools and Web Options**.

Step 3 In the **Web Options** dialog box, select the **Encoding** tab.

Step 4 From the **Save this document as** list, **select UTF-8**.

Step 5   Select **OK** to return to the **Save As** dialog box.

Step 6   From the **Save as type** list, select **CSV (Comma delimited) (*.csv)**.

Step 7   In the **File Name** field, type a name for the CSV file and select **Save**.

Import and Export Users

Procedure

Step 1   To import users from a CSV file, in the Webex Messenger Administration Tool, select the **User tab** > **More Actions > Import/Export**.

Step 2   Select **Browse** and select the CSV file that contains the list of users you want to import.

Step 3   Select **Import** to begin the import process.

Step 4   To export users, select **Export** in the **Import/Export User** dialog box.

A progress message indicates the progress of the export process.

Step 5   To view the CSV file that contains the exported users, select the time stamp of the export message. A confirmation prompt appears. The message resembles the following example: `Last export: 2009-06-24 09:02:01.`

Step 6   Select **Open** to view the CSV file containing your Messenger organization's users. Alternatively, select **Save** to save the CSV file to your local computer.

Assign Users to Policies

Procedure

Step 1   To assign users to policy groups, select the **User tab**.

Step 2   If you want to assign a policy group to a new user, create the new user first by selecting **Add**.

Step 3   If you want to assign a policy group to an existing user, search for the user.

Step 4   In the search result, double-click the appropriate user's name to open the **Edit User** dialog box.

Step 5   Select the **Policy Group Assignment tab** to open the **Policy Group Assignment** dialog box.

Step 6   In the **Search** field, enter at least one letter of the policy group that you want to search for and assign to this user.

Step 7   Select **Search.**

Step 8   In the **Search Result** window, select the appropriate policy group and select **Assign** to assign the policy to this user.

Step 9   Select **Save** to save the policy group assignment and return to the **User** tab.