Users

Before You Begin

1. You will need ADMIN or above rights in order to create users.
2. You will need the names and email addresses of any new users you wish to create.

EXERCISE ONE - Creating Users

1. Log into Collaborate using your Admin ID.

![User Login Form](image)
2. From the main screen select the Utilities tab.

a. If Java requests permission to run click **Yes**.

4. Click **Accept**.
5. Click **New**.

6. Select the **Role** you want to assign.

   a. To create a “Supervisor” click the circle next to “Supervisor”.
      i. Check the box next to “May Manage User Passwords” if you want the supervisor to be able to reset the passwords of Moderators and Participants.
   b. To create a “Moderator” click the circle next to “Moderator”.
   c. To create a “Participant” click the circle next to “Participant”.
      i. Each “Participant” you create will need to be assigned to a “Supervisor”, typically the “Supervisor” creating the session they will be attending.
7. Type in the **Username** you wish to assign.

8. Type the **Password** for the user.
9. Re-type the password in the **Confirm Password** box.

![New User Form](image)

10. **Display Name** is optional.

![New User Form](image)

a. For example if you used “jsmith_UI” as the “Username” you could put “John Smith” as the user name.
11. Enter the **Email Address** of the new user.

![New User Form]

   a. Place a check in the box next to “Notify New User” if you want the user you are creating to receive an email notifying them that their account has been created.
   b. The email will contain both their username, password, and a link to Collaborate.

12. The following fields are **OPTIONAL** and are not required to create a new user (First Name, Last Name, Country, State, City/Town, and Phone).
13. Once you have entered all required information (*) click **Save**.

14. You can then create another user.
EXERCISE TWO - Editing Users

1. From the main screen select the **Utilities** tab.

2. Under **User Management** select **Users**.
3. Click **Accept**.

![User Sort/Filter](image)

4. From the list **select** the user which you wish to edit.

<table>
<thead>
<tr>
<th>Login Role</th>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td>MODERATOR</td>
<td>AARONE_1_MOD</td>
</tr>
<tr>
<td>MODERATOR</td>
<td>AARONE_2_MOD</td>
</tr>
<tr>
<td>MODERATOR</td>
<td>AARONE_3_MOD</td>
</tr>
<tr>
<td>PARTICIPANT</td>
<td>UIOWA-ITSMODERATOR</td>
</tr>
<tr>
<td>PARTICIPANT</td>
<td>AARONE_1_PART</td>
</tr>
<tr>
<td>PARTICIPANT</td>
<td>AARONE_2_PART</td>
</tr>
<tr>
<td>PARTICIPANT</td>
<td>AARONE_3_PART</td>
</tr>
<tr>
<td>SUPERVISOR</td>
<td>AARONE_1_SUP</td>
</tr>
<tr>
<td>SUPERVISOR</td>
<td>AARONE_2_SUP</td>
</tr>
<tr>
<td>SUPERVISOR</td>
<td>AARONE_3_SUP</td>
</tr>
<tr>
<td>SUPERVISOR</td>
<td>UIOWA-ITSSUPERVISOR</td>
</tr>
</tbody>
</table>

a. Click the grey box to the left of the “Username” column.

b. The row of the user you are editing will then be highlighted in yellow.
5. Click **Edit**.

6. You will be in the **User Profile Information** screen.
7. Click **Edit**.

8. You can now **edit** the following information.

   - Username
   - Password
     - You must confirm the new password.
   - Display Name
   - Email Address
   - Active
     - You can deactivate a user by unchecking the box. This will leave the user in the Collaborate system but they will not be able to access Collaborate until they are made and active user again.
   - Time Zone
9. Once you have updated the information you wish to update click **Save**.
EXERCISE THREE - Deleting Users

1. From the main screen select the **Utilities** tab.

2. Under **User Management** select **Users**.
3. Click **Accept**.

4. Select the user(s) you wish to delete by clicking the grey box(es) to the left of the **Username**.

   a. If selecting more than one user they **MUST** all have the same **Login Role**.
5. Once you have selected all of the users to be deleted click **Delete**.

6. You will see an information box.

7. Click **Yes** if you wish to proceed, click **No** if you need to return to the list of users.
EXERCISE FOUR - Batch Upload of Users

1. Create and Excel sheet using the following criteria (DO NOT use a header row).

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>S</td>
<td>AaronE_1_SUP</td>
<td>Aaron1S <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>2</td>
<td>S</td>
<td>AaronE_2_SUP</td>
<td>Aaron2S <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>3</td>
<td>S</td>
<td>AaronE_3_SUP</td>
<td>Aaron3S <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>4</td>
<td>M</td>
<td>AaronE_1_MOD</td>
<td>Aaron1M <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>5</td>
<td>M</td>
<td>AaronE_2_MOD</td>
<td>Aaron2M <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>6</td>
<td>M</td>
<td>AaronE_3_MOD</td>
<td>Aaron3M <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>7</td>
<td>P</td>
<td>AaronE_1_PART</td>
<td>Aaron1P <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>8</td>
<td>P</td>
<td>AaronE_2_PART</td>
<td>Aaron2P <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
<tr>
<td>9</td>
<td>P</td>
<td>AaronE_3_PART</td>
<td>Aaron3P <a href="mailto:aaron-elam@uiowa.edu">aaron-elam@uiowa.edu</a></td>
</tr>
</tbody>
</table>

a. Operation
b. User Role (required)
   i. S = Supervisor
   ii. M = Moderator
   iii. P = Participant
c. Username (required)
d. Password (required)
e. Display Name
f. Title
g. First Name
h. Last Name
i. Email Address (required)
j. Country
k. Province/State/County
l. Area Code
m. Phone Number
n. User Level
2. **Save** the Excel sheet as a .csv file.

```
Excel Workbook
Excel Macro-Enabled Workbook
Excel Binary Workbook
Excel 97-2003 Workbook
XML Data
Single File Web Page
Web Page
Excel Template
Excel Macro-Enabled Template
Excel 97-2003 Template
Text (Tab delimited)
Unicode Text
XML Spreadsheet 2003
Microsoft Excel 5.0/95 Workbook
CSV (Comma delimited)
Formatted Text (Space delimited)
Text (Macintosh)
Text (MS-DOS)
CSV (Macintosh)
CSV (MS-DOS)
DIF (Data Interchange Format)
SYLK (Symbolic Link)
Excel Add-In
Excel 97-2003 Add-In
PDF
XPS Document
Strict Open XML Spreadsheet
OpenDocument Spreadsheet
```
3. From the main screen select the **Utilities** tab.

4. Under **User Management** select **Users**.
5. Click **Accept**.

6. Click **User Upload**.
7. From the drop down menu select the **Supervisor** that will be over the users you are uploading.

8. Click **Upload New**.
9. Select the Excel file containing the new user information.

10. Click Open.
11. Click **OK** once file has been uploaded.

![File Upload dialog box with OK button highlighted]

12. Click **Previous** and ensure that all users were uploaded correctly.

![Table showing user roles and usernames]