clipperAI

OrgAdmin user guide

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Introduction

OrgAdmin is an administration tool that allows your organization to manage your purchased licenses and your users' access to them.

You can, for example:

- Create and manage user groups for your organization for controlling access to licenses
- Invite users to your organization
- Manage user access to licenses
- Reserve seats from licenses for users
- Grant administrator access to users, and create new administrator roles if needed
- View the usage of licenses

Access OrgAdmin

To access OrgAdmin, you need a user account and administrator access rights to your organization's data.

To access OrgAdmin, go to the OrgAdmin URL, and log in either with your username and password or with a single sign-on (SSO) option, depending on what options are available.

Navigation

When you log in, you first come to the Dashboard.

Use the sidebar navigation on the left to navigate to the different features in OrgAdmin.

In the top toolbar on the right, you can change the language in the tool, access your profile settings, and log out.

List views

All the OrgAdmin list views (such as the list of users or licenses) have some common features.

Above the list, you have the following options:

- Search the list content. Enter text in a search field and click **Search** to update the list.
- Select which columns to show on the list. Click the column edit icon, select the columns you want, and the list is updated.

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- Reset the list to clear the search and restore the default set of columns.
- Reload the list to update it with the latest data. The lists are not refreshed automatically.

  A reload button is also available in several other places in OrgAdmin for refreshing the data.

Some list views have an additional filter option. For example, on the user list, you can filter users based on their status and whether they have admin access.

On the list itself, you can do the following:

- Sort the list by column. Change the sorting order by clicking the double arrow next to a column title.
- In the rightmost **Tools** column, you have a three-dot menu for each item on the list. The menu has options for that item, such as viewing the item's details.

Dashboard

The Dashboard shows some key details on your organization's data and provides quick links to commonly used functions:

User groups
Shows information on your organization's user groups. Use the quick links to view all user groups, or users that belong to a specific group. You can also invite users to a group.

Users
Shows information on your organization's users. Use the quick links to view all users, or a specific user's groups or licenses.

Invitations
Shows information on invitations to users to join your organization. Use the quick links to view all invitations, or delete invitations.

Licenses
Shows information on the licenses purchased by your organization. Use the quick links to view all licenses, or the usage of a specific license.

Technical limitations

- In all OrgAdmin fields, the maximum value length is 2048 characters.

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Manage user groups

In OrgAdmin, you can create user groups to control your users' access to your organization's licenses.

Create groups and assign users to them based on your organization's needs to manage user access. For example, a common use case is to control access in a different way for employees and contractors, and manage these users in separate groups.

You cannot grant an individual user access to licenses directly—the authorization always comes through a group.

See more on how to grant users access to licenses.

View user groups

1. In the left sidebar, go to **User groups**.
   The list of your organization's user groups opens.

2. To view a group's details, click the **Tools** menu > **View details** for the group.
   A dialog opens, displaying the group's details. You can also check which licenses the group has access to: **Entitlements** lists the entitlements the group has access to, and clicking an entitlement shows the licenses it holds.

Create a user group

Your organization has some predefined user groups available, and you can create more groups if needed. You can also give the new group access to licenses right away.

To create a user group:

1. In the left sidebar, go to **User groups** and click **Create**. A dialog opens.

2. In **Name**, define a name for the group.

3. In **Type**, enter a type for the group.
   You can enter a custom type or one of the predefined group types:
   - **employees**: The group type to be used for your organization's employees.
     - Compared to **licenseConsumers**, this group type provides users with wider access to your organization's data.
     - Your organization can only have one user group of this type. This is typically created for you by default.
   - **licenseConsumers**: The group type to be used for (non-employee) users.
     - This is an example group type that can be used, for example, to group users who are external to your organization but allowed to use the organization's licenses.

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4. In **Description** (optional), enter a description for the group.

5. In **Entitlements** (optional), grant the group access to licenses by selecting the entitlements that hold those licenses. You can also do this later.

6. Click **Create** to create the group.

Next, you can add existing users to the group, or invite or import new and existing users to the group.

Edit a user group

You can edit a user group's details and define which entitlements (licenses) the group can access:

1. In the left sidebar, go to **User groups**.

2. On the group list, click the **Tools** menu > **View details** for the group.

3. In the dialog that opens, click **Edit**.

4. Edit the details and change which entitlements the group has access to. This is done in the same way as when creating a new group.
   You cannot edit the group type of the predefined **employees** group.

5. Click **Apply**.

Delete a user group

You can delete user groups, if needed, except for the predefined **employees** group. Deleting a user group doesn't delete the users who belonged to that group.

The users in the deleted group lose access to the licenses that the group had access to, unless they still have access to the licenses through some other group. If the users have any seat reservations to the licenses, those are also released.

> **Note:** If a user no longer belongs to any group of your organization, they won't be visible in your OrgAdmin anymore.
> If an administrator user no longer belongs to any of your user groups, this doesn't automatically remove their administrator access to OrgAdmin. If needed make sure to first remove their administrator access, and then delete the user group.

Instead of deleting a user group, you also have the option of removing the group's access to licenses. See above how to edit a group.

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To delete a user group:

1. In the left sidebar, go to **User groups**.
2. On the group list, click the **Tools** menu > **Remove** for the group.
3. In the dialog that opens, click **Remove** to confirm.

If a user is currently using a license they no longer have access to, they are able to continue using the license until the license lease expires or the software application tries to refresh the lease, whichever comes first.

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Manage users

In OrgAdmin, you can create user accounts for the end users who use the software that your organization has purchased licenses for, and for your organization's administrators who use the OrgAdmin tool.

You can create new users for your organization by sending them an email invitation, which they can accept or decline. You can also send email invitations to invite existing users to your organization.

You can also import new and existing users using a comma-separated value (CSV) file, without sending an email invitation.

Matching to existing users in the system is based on the email address, so each user must have a unique email address.

Inviting and importing of users adds them to user groups. This grants the users access to the licenses that the groups have access to.

When you invite a new user, their user account is created and the access rights take effect after they have accepted the invitation and signed up. With an existing user as well, the new access rights take effect after they have accepted the invitation and logged in.

With the default configuration, you cannot suspend or delete users in OrgAdmin. Contact the ClipperAI team for support.

You also cannot directly edit users' details in OrgAdmin, but you can update them using an import. Every logged-in user can also edit their own details on their profile page.

See also how to manage user access to licenses, including removing users from your organization if needed.

View users

1. In the left sidebar, go to **Users**.
   The list of your organization's users opens—users who belong to at least one of your organization's user groups.
   The list shows information on each user, such as their name and email address.
   For non-administrator users, the list also shows the status: **Active** or **Inactive** (depending on whether they have been active within the past 30 days), or **Suspended** (the user's account has been disabled).

2. To view a user's details, click the **Tools** menu > **Profile details** for the user.

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Invite users

You can send an email invitation to invite new and existing users to your organization.

With the invitation, you add the users to user groups, and you can grant administrator access to your organization if needed.

You cannot send an invitation to an email address if an earlier invitation already exists with the same address. This can happen, for example, if the user declined an earlier invitation. See how to resend or delete the earlier invitation.

Do you have the recipients defined in a CSV file? See how to use the CSV import option.

To invite users:

1. In the left sidebar, go to **Users** and click **Invite**. A dialog opens.
   (Or, go to **Invitations** and click **Create** > **New user invitation**.)
2. In **Recipients**, add all the recipients.
   To add a recipient, enter their name to be shown in the email invitation, and their email address, and click the + icon.
   For an existing user, make sure to use the email address defined in their existing user account. If an email address is not yet used in any user account in the system, a new user account is created.
   You can edit a recipient by clicking the pen icon, and delete one by clicking the trash can icon.
3. On the user group list, select at least one group that the users will be added to.
4. In **Assign Admin access** (optional), select to grant organization administrator access to all the users.
   This assigns them the predefined default OrgAdmin role.
5. In **Message**, enter a short personal message for the invitation. The invitation will also show your (the inviter's) name.
   The personal message is added to the default email message. It's also shown on the web page where the recipient accepts or declines the invitation.
   The maximum message length is 2048 characters. Any line breaks are ignored—the message is shown as one paragraph of text.
6. Click **Invite**.

You can also invite users to a specific user group from the **User groups** page: click the **Tools** menu > **Send invite** for the group, and follow the same steps as above.

If your organization is using custom roles to apply different levels of access to different administrators, assign roles to the users accordingly.

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Invite users with CSV import option

You can use a CSV import to send an email invitation to invite new and existing users. The users can accept or decline the invitation.

With this import option, you can add new and existing users to user groups, and you can also grant administrator rights if needed.

The format of the CSV file is simple. Use two columns with data on each recipient on a separate row:

- The recipient's name to be shown in the email invitation
- The recipient's email address

The column order doesn't matter. No column header row is needed.

Example:

```
Unset
Bob Jones,bobjones@yourcompany.com
Mary Mills,marymills@yourcompany.com
```

If the email address is already associated with a user account in the system, the import updates that user. Otherwise a new user is created.

The import can only add more user groups and add administrator access for existing users, it cannot remove any access. The import also doesn't update the user's name.

In practice, this import option is just another way to define recipients in the dialog when you're inviting users, except you use a CSV file instead of entering recipients manually (or you can do both). See the steps how to invite users, and in the invitation dialog click **Import CSV** and select the CSV file.

> **Note**: When creating the CSV file, make sure you save the file with the UTF-8 encoding. Otherwise extended characters won't show correctly such as names with a single quote like O'Malley.

Import users

When you're inviting a large amount of users to your organization, it can be easier to define the recipients in a CSV file (.csv) and use the import feature.

You can use a CSV import to create and update users in the system. No email invitation is sent.

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With this import option, you can add new and existing users to user groups, and also define the user details for the imported users' accounts. For existing users, the details in the import file override their earlier account details.

This import option doesn't allow granting administrator access.

> **Note**: For new users, the import creates a user account without a password. The import functionality mainly serves use cases where users have to be provisioned and where end users authenticate with an external identity provider.

The CSV file must contain at least the first name, last name, and email address for each recipient. Any additional fields must match user account fields available in the system.

On the first row of the CSV file, specify the column headers for the data fields. On the following rows, specify each recipient's data on a separate row.

The required fields and the column header names to use (the column order doesn't matter):

- **first name**: The recipient's first name
- **last name**: The recipient's last name
- **email**: The recipient's email address

Example:

```
Unset
first name,last name,email,professional title
Bob,Jones,bobjones@yourcompany.com,Accountant
Mary,Mills,marymills@yourcompany.com,Designer
```

If the email address is already associated with a user account in the system, the import updates that user. Otherwise a new user is created.

The import can only add more user groups for an existing user, it cannot remove any.

However, user details can be removed by the import: if the CSV file specifies a column header but the field is empty for a recipient, the import clears that field in the user's account.

> **Note**: Although the recipient's first and last name are required, importing is possible with the recipient's email address only. Also, the first and last name of a recipient can be removed by the import if these fields are empty.

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To import users without an email invitation:

1. In the left sidebar, go to **Users** and click **Import**.
2. Click **Browse**, and select the CSV file.

   Note: When creating the CSV file, make sure you save the file with the UTF-8 encoding. Otherwise extended characters won't show correctly such as names with a single quote like O'Malley.
   After you have selected the CSV file, the import dialog displays the recipient data found in the file.

3. Check that the CSV data was mapped correctly to the system's user account fields, and click **Continue**.
4. Select the user groups that the users will be added to.
5. Click **Import**.

If any of the users need administrator access to your organization, see how to grant access.

Manage user invitations

You can view and manage user invitations to your organization, and resend or revoke them if needed:

1. In the left sidebar, go to **Invitations**.

   The list of invitations to users opens.
   The list shows information on each invitation, such as the status, the recipient email address, and the groups that the user was invited to.
   The invitation status can be **Pending** (not accepted or declined yet), **Accepted**, **Declined**, **Unsent** (not sent yet, for example, due to technical issues), or **Expired**.

2. On the invitation list, click the **Tools** menu for an invitation and use the following options:
   - To view an invitation, select **View details**.
   - To resend the invitation email, select **Resend**, and click **Resend** again to confirm.
   - To delete the invitation from the system, select **Remove**, and click **Remove** again to confirm.

Grant administrator access to a user

You can grant a user administrator access to your organization already when inviting a user or later on. This gives the user access to the OrgAdmin tool.

To grant administrator access using the predefined default OrgAdmin role:

1. In the left sidebar, go to **Users**.
   On the user list, the **Status** column shows **Admin** for users who have administrator access.

2. To grant administrator access, click the **Tools** menu > **Assign Admin access** for the user.
   Confirm by clicking **Assign** in the dialog.
   To remove administrator access, click the **Tools** menu > **Unassign Admin access**.
   Confirm by clicking **Unassign** in the dialog.
   You cannot remove administrator access from yourself.

If your organization is using custom roles to apply different levels of access to different administrators, you can assign some other applicable role instead.

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Manage access to licenses

In OrgAdmin, you can manage your users' access to the licenses your organization has purchased.

Access to licenses is based on group access to entitlements:

1. You set up user groups, and grant the groups access to the entitlements that hold licenses.
2. Then you associate users with applicable groups. This allows them to use the licenses that their groups have access to.

See instructions below on how to add existing users. You can also remove a user from the whole organization (all user groups) in one go.

If needed, you can also block users from using a license.

View which groups can access a license

1. In the left sidebar, go to **Licenses**.
2. On the license list, click the **Tools** menu > **License details** for the license. A dialog opens.
3. In **Entitlement**, click the entitlement that holds the license.
   A dialog opens, displaying the user groups that have access to this license.

Assign users to groups

Add users to a group to give them access to the licenses that a user group group has access to.

You also have the option of inviting new and existing users to groups by email, or adding or inviting users to groups using a CSV import.

If you remove a user from a group, they lose access to the group's licenses and their seat reservations for the licenses are released, unless they belong to another group that still allows them access to those licenses.

If the removed user is currently using a license they no longer have access to, they are able to continue using the license until the license lease expires or the software application tries to refresh the lease, whichever comes first.

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Note: If you remove a user from all of your organization's user groups, they won't be visible in your OrgAdmin anymore.
Before removing an administrator user from your organization, make sure to first remove their administrator access. Removing them from all user groups doesn't remove their administrator access to OrgAdmin.

To define which users belong to a group:

1. In the left sidebar, go to **User groups.**
2. On the group list, click the **Tools** menu > **Members** for the group.
   A dialog opens, displaying a list of all of your organization's users.
   The ones that are selected on the list already belong to the group.
3. Select and clear checkboxes on the list to define which users belong to the group.
   To select or clear all checkboxes, click the checkbox on the header row.
4. Click **Apply**, and then click **Yes** to confirm.

Or, change which groups a specific user belongs to:

1. In the left sidebar, go to **Users**.
2. On the user list, click the **Tools** menu > **Groups** for the user.
   A dialog opens, displaying a list of all of your organization's user groups.
   The ones selected on the list are where the user currently belongs to.
3. Select and clear checkboxes on the list to define which groups the user belongs to.
4. Click **Apply**, and then click **Yes** to confirm.

Remove a user from your organization

You can remove a user from your organization, which removes them from all of your organization's user groups in one go.

Note: After this, the user won't be visible in your OrgAdmin anymore.
Before removing an administrator user from your organization, make sure to first remove their administrator access. Removing them from all user groups doesn't remove their administrator access to OrgAdmin.

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To remove a user from your organization:

1. In the left sidebar, go to **Users**.

2. On the user list, click the **Tools** menu > **Remove from organization** for the user.
   A dialog opens. You cannot remove yourself from the organization.

3. Enable **Remove active licenses** leases if you want to release any license seats the user currently has in use.

4. Click **Remove** to remove the user from the organization.

Block a user from using a license

If needed, you can block a user from using a license. The user cannot use the blocked license even if they have access to it through a group.

If the user is currently using a license that you block for them, they are able to continue using the license until the license lease expires or the software application tries to refresh the lease, whichever comes first.

To block licenses for a user:

1. In the left sidebar, go to **Users**.

2. On the list, click the **Tools** menu > **Licenses** for the user.
   A dialog opens, displaying the licenses that the user has access to.

3. In the **BLOCKED** column, change which licenses are blocked for the user:
   - To block a license, click **Block**.
     - If the user has a seat reservation for the license, blocking releases it.
   - To unblock a license, click **Release**.

4. Click **Save**, and then click **Yes** to confirm.

Or, to block a license for multiple users at a time:

1. In the left sidebar, go to **Licenses**.

2. On the license list, click the **Tools** menu > **Usage** for the license.
   A dialog opens, displaying all of your organization's users.

3. In the **BLOCKED** column, block and unblock users in the same way as above.

4. Click **Apply**, and then click **Confirm** to confirm.

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Manage licenses

In OrgAdmin, you can view information on the licenses your organization has purchased, for example, what type of license credit they contain (such as seats) and how much credit is still left. For seat-based licenses, you can also handle the seat reservations per license.

When a user starts using a license, this starts a license lease in the system—a time-limited authorization for that use to use the license. The lease defines how the license allows using the software application, for example, which features are allowed, and when the authorization expires.

View licenses

1. In the left sidebar, go to **Licenses**.
   The list of your organization's licenses opens, displaying information on each license:
   - **State**: The license status: **Valid**, **Scheduled** (the validity period hasn't started yet), **Expiring** (the validity ends within 7 days), **Expired**, or **Deactivated**.
   - **Valid from** and **Valid until**: The validity start and end date.
   - **Name**: The name of the license.
   - **Entitlement**: The entitlement that holds the license.
   - **Model**: How seats in a seat-based license are handled:
     - **Named**: For users to be able to use the license, you need to reserve them a seat in advance.
     - **Floating**: Either the license seats are used from a floating pool, or the license uses named seats but no advance reservations are needed.
   - **Type**: The type of credit the license has: seats, use count, or use time.
   - **Reserved**: The number of seats that have been reserved from a seat-based license.
   - **Seats: total**: The total number of seats in a seat-based license.
   - **Seats: consumed**: The number of seats in a seat-based license that are currently in use.
   - **Seats: available**: The number of seats in a seat-based license that are currently not being used. Reserved seats are excluded from the available seats.
   - **Use count: total**: The total use count granted in a use count-based license.
   - **Use count: consumed**: The amount of credit that has been used from a use count-based license.
   - **Use count: available**: The amount of credit left in a use count-based license.
   - **Use time: total:** The total use time granted in a use time-based license.
   - **Use time: consumed**: The amount of use time that has been used from a use time-based license.
   - **Use time: available**: The amount of use time left in a use time-based license.
   - **Allowed versions**: The software versions that the license allows to use.

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2. To view a license's details, click the **Tools** menu > **License details** for the license.

Reserve license seats

You can use seat reservations, for example, to make sure certain users always have access to the software application.

To change seat reservations for a license:

1. In the left sidebar, go to **Licenses**.
2. On the license list, click the **Tools** menu > **Usage** for the license.
   A dialog opens, displaying the users that have access to the license.
3. In the **RESERVED** column, change the seat reservations for the license:
   - To reserve a seat from a license for a user, click **Reserve**.
     - If the license has been blocked for the user, reserving a seat unblocks it.
     - If the button is disabled, there are no available seats left in the license.
   - To release a seat reservation for a license, click **Release**.
4. Click **Apply**, and then click **Confirm** to confirm.

You can also change an individual user's seat reservations on the user list:

1. In the left sidebar, go to **Users**.
2. On the user list, click the **Tools** menu > **Licenses** for the user.
   A dialog opens, displaying the licenses that the user has access to.
3. In the **RESERVED** column, change the user's seat reservations for licenses in the same way as above.
4. Click **Save**, and then click **Yes** to confirm.

Release licenses currently in use

When a user is using a seat-based license, the software application may release the seat already before the license lease expires, for example, if the user logs out.

You can also manually release a license seat that a user is currently using to make it available to other users. This ends the license lease in the system.

This may be needed, for example, in a situation where the user's device is broken, and you need to release their seat so that they can start consuming the license on another device.

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Note: The software application is able to continue using the license until the lease expires or the client application tries to refresh it. This means another user is able to start using the same license seat at the same time.

With licenses that have either use count or use time credit, releasing an active license lease doesn't impact the license availability, and no credit is returned.

Note that releasing a license seat that's in use is different from releasing a seat reservation. A seat reservation only means that one seat from the license is booked for a specific user, and releasing the reservation doesn't affect an ongoing license lease in any way.

To release a license seat currently in use:

1. In the left sidebar, go to **Licenses**.
2. On the license list, click the **Tools** menu > **Usage** for the license.
   In the dialog that opens, the **IN USE** column shows which users are currently using the license.
3. To release the seat usage for a user, click the trash can icon in the **IN USE** column.
4. Click **Apply**, and then click **Confirm** to confirm.

You can also release seats for a user from the user list:

1. In the left sidebar, go to **Users**.
2. On the user list, click the **Tools** menu > **Licenses** for the user.
   A dialog opens, displaying a list of all your licenses.
3. To release the user's seat usage for a license, click the trash can icon in the **IN USE** column.
4. Click **Save**, and then click **Yes** to confirm.

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View license usage

In OrgAdmin, you can view usage information on your organization's licenses.

View usage of a license

1. In the left sidebar, go to **Licenses**.
   The license list shows the total, used, and currently available credit for licenses.

2. To view a license's current usage, click the **Tools** menu > **Usage** for the license.

View current license usage for a user

1. In the left sidebar, go to **Users**.

2. Click the **Tools** menu > **Licenses** for the user.
   A dialog opens, showing the same usage information as above for the licenses that the user has access to.

Need assistance?

Visit our **FAQ page** for answers to frequently asked questions.

If you require additional help or technical support, feel free to contact our support team.

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