Clearlogin - Clearlogin Directory

In This Article

Overview

Clearlogin Directory (CLD) is a local directory in your Clearlogin tenant that you can use for users and groups. You can have multiple Clearlogin directories, which allows you to group user accounts across separate directories for compliance or auditing purposes. You can also create a separate directory for testing and development purposes.

By default, a new CLD is empty. This means you will need to create your user accounts individually in the admin portal, or upload a CSV file that contains a list of your users and their attributes.

Create a Clearlogin Directory

- Sign into the **Clearlogin Admin Console:** https://admin.clearlogin.com
- In the left navigation bar, browse to: **Identity Sources**
- Click on the **New Identity Source** button, and select **Clearlogin Directory**

In the **Clearlogin Directory configuration** page, fill out the following fields:

- **Display name:** Give the Identity Source a name. **Example**: Company Name CLD
- **User domain:** This is the domain that your CLD instance is a part of and that users will use to log into Clearlogin. **Example**: domain.com
- **Access tag:** <leave blank>
- **Priority:** 1
- **Timeout:** 10 seconds

Click **Create Clearlogin Identity Source** to save the configuration.

> (i) **After you create the configuration** Clearlogin will take you to the CLD page where you can add new users. To get back to the configuration page, you have to go back to **Identity Sources**, and click on the CLD you just created.

| Search usernames... | 👤+ Add New Person | ✏️ Edit Template | ☁ Upload CSV |

USERNAME   **EMAIL**   **GROUPS**

Default Person Template

The default person template is used to define the attributes that are available each time you create a new user account.

To edit a Default Person Template:

- Select **Clearlogin Directory** from the left-hand navigation bar.
- Click on the Clearlogin Directory you wish to modify
- Click the **Edit Template** button

- By default you get the attributes shown in the below screenshot. From here you can add additional attributes.
    - **Text:** Adds an attribute for plain text
    - **Checkbox:** Adds a binary check box (enable | disable) (true | false)
    - **List:** Create an attribute with a list of items that will be included when creating a new user account.

When creating new attributes we recommend your attribute names not contain any spaces. If needed, use dashes or underscores.

- Default attributes have a grey background.
- You cannot delete any of the default attributes.
- You cannot change the order of the attributes.
- You can add default values to the attributes.
- List values can be entered with a comma separating each value, or hit <enter> after each value.
- When creating a new user account, Username is the only required field.

A Text **☑ Checkbox** **≡ List**

Attribute	Default Value
avatar_url	
username	
password	
name	
email	
groups	
password_reset	✔

🖫 Save

Create a New User Account

- Select **Clearlogin Directory** from the left-hand navigation bar.
- Click on the **Clearlogin Directory** that will house the new user account.
- Click the **Add New Person** button
- Fill in the fields defined by your default person template and click **Save**

You can also create new attributes while adding new user accounts.

IMPORTANT: You cannot change a person's username once they have been created. To change the username you must make a new user account.

A Text	☑ Checkbox	☰ List

username   [   ]

password   [👁]

name   [   ]

email   [   ]

groups   [   ]

password_reset_   ☑
required

[🖫 Save]

Bulk Add User Accounts with a CSV File

You can build a CSV file and use it to bulk create all of your user accounts. The bulk add process is based on the Default Personal Template, or the Google Education Template.

Click on the below links to expand their instructions.

> ⓘ We recommend you configure your **Default Person Template** before creating your CSV file. After configuring your default person template use the **Download Sample** button to download the example CSV file, which will be based on the changes you made to the default person template.

- Browse to your Default Person Template and choose **Upload CSV**.
- On the left side of the upload page, your default people template should already be selected, but if needed, choose it from the drop-down menu.
- In the right sidebar of the upload page, you'll see a list of columns required in your CSV file. If needed, you can edit your default people template to add/remove columns, and also **download a sample CSV** file to get you started.

	A	B	C	D	E	F
1	avatar_url	username	password	name	email	groups
2	your text here	your text here	your text here	your text here	your text here	value 1,value 2,value 3
3	your text here	your text here	your text here	your text here	your text here	value 1,value 2,value 3
4	your text here	your text here	your text here	your text here	your text here	value 1,value 2,value 3

- **Back to the left side of the upload page**, select one or more of the listed actions to perform after your CSV has been uploaded.
    - **Destroy people that are not in CSV** - Select this if you want all user accounts in your directory to be deleted if they are not in your CSV.
    - **Destroy attributes not listed in CSV** - Select this if you want to delete all attributes in your directory that are not in your CSV.

> ⊘ Any user that is affected by this will be forced to change their password the next time they sign in.

    - **Require password reset?** - Select this if you want to force all new users created with your CSV to reset their password when they sign in for the first time. If "Destroy attributes not listed in CSV" is selected, then existing users will have to change their passwords too.
    - **Lock people?** - Select this if you want all newly created accounts locked until you are ready to unlock them. This is useful if you are setting up user accounts in advance. If "Destroy attributes not listed in CSV" is selected, then existing users will be locked too.
- Browse to the CSV file on your local computer.
- Click the **Upload** button.

These steps are for bulk uploading your user accounts from CSV files downloaded from your school data in G Suite for Education. The steps to create the CSV files are located in this **Google Article**. After downloading the CSV files from Google, follow the below steps.

- Select **Clearlogin Directory** from the left-hand navigation bar.
- Click on the Clearlogin Directory you wish to modify
- Click on **Upload CSV**.
- On the left side of the upload page, change the Select Template drop-down menu to **Google Education**.
- The page will change to look like the below screenshot.
- Browse to and select each respective CSV file. There should be 5 files.
- Based on your needs, consider enabling one or more of the following options:
    - **Destroy people that are not in CSV** - Select this if you want all user accounts in your directory to be deleted if they are not in your CSV.
    - **Destroy attributes not listed in CSV** - Select this if you want to delete all attributes in your directory that are not in your CSV. Any user that is affected by this will be forced to change their password the next time they sign in.
    - **Require password reset?** - Select this if you want to force all new users created with your CSV to reset their password when they sign in for the first time. If "Destroy attributes not listed in CSV" is selected, then existing users will have to change their passwords too.
    - **Lock people?** - Select this if you want all newly created accounts locked until you are ready to unlock them. This is useful if you are setting up user accounts in advance. If "Destroy attributes not listed in CSV" is selected, then existing users will be locked too.
- Click **Upload** to start the import process.

Create Groups

There is no separate area for managing groups. Instead you create a list of groups in the **Groups** field in your **Default Person Template**, or while creating a new user account. To enter multiple group names, separate them with a comma or hit <enter> after each name. Spaces in group names are allowed.

If you plan on creating a large number of groups we recommend you create one or more **List** attributes in your default person template to categorize the groups. For example, you could have a group list of offices and another group list of departments. Here's what that could look like:

| groups_office | ×NYC ×CHI ×LAS ×LAX | 🗑 |
| groups_dept | ×HR ×Sales ×Finance ×Exec | 🗑 |