

∞drive suite

Administrator Guide

User management



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Contents

1. Getting started configuring your workspace	5
1.1. Compatibility	7
Operating systems	7
Web browsers	7
Other software	7
1.2. Log in to your workspace	8
Log in with your Oodrive login credentials	8
Log in with your company login credentials	10
1.3. Overview of the Users module	12
1.4. Browse the Users Module	13
1.5. View available storage and licenses	13
1.6. Search for a User or Contact	14
1.7. Filter accounts	14
1.8. Account statuses	15
1.9. Authentication modes	16
Logging in to the workspace	16
Authentication options	16
2. Creating new accounts	17
2.1. Account types	17
Special case: restricted permissions	17
2.2. Create a new account	19
2.3. Create accounts in bulk	20
Import a list of Users	21
Import a list of Contacts	26
3. Managing requests to create an account	30
3.1. Accept a request	30
3.2. Deny a request	31
4. Modifying an existing account	32
4.1. Modify an individual account	33
4.2. Modify accounts in bulk	33
4.3. Transfer data from one User account to another	35

4.4. Delete an account	36
4.5. Reset a password	37
4.6. Reset an authentication mode	38
Reset a temporary code (TOTP code)	38
Reset a security key	38
5. Configuring advanced settings	39
5.1. Automatic suspension	39
Receive suspension notifications	39
Enable automatic suspension	40
Enable automatic closure	40
5.2. Profile modification	40
5.3. Account visibility	41
5.4. Block contact management	42
5.5. Notification sender email address	43
5.6. Email domain name filtering	43
Enable email address domain filtering	43
Disable email address domain filtering	45
Remove a domain filter	45
5.7. Storage	45
Advanced setting: minimum storage	45
Default user storage	46
Default teamspace storage	46
Maximum storage for a teamspace that can be configured by an owner	47
Backup storage	47
5.8. Default email language	48






1. Getting started configuring your workspace

As an Oodrive account holder with administrative rights, you have been made administrator of one or more administration modules on your company's workspace.

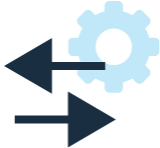




As a result, you are responsible for configuring a certain number of options relating to the behavior of applications offered to your organization's employees.

Several administration modules may be available to you in the Oodrive Suite portal, depending on how these responsibilities have been assigned within your company.

Some administration modules are shared between all Oodrive solutions and allow you to configure and monitor your workspace as a whole :

Shared administration modules	
Access Management 	<ul style="list-style-type: none"> Configuration of workspace access and authentication Access documentation
User Management 	<ul style="list-style-type: none"> Management of workspace users Access documentation
Custom Graphics Management 	<ul style="list-style-type: none"> Configuration of the workspace name, logos and colors Access documentation
Activity Tracking 	<ul style="list-style-type: none"> Activity tracking for all workspace users Access documentation
Administration of Legal Notices 	<ul style="list-style-type: none"> Management of legal notices and approval by workspace users Access documentation

Other administration modules are dedicated to a specific solution. These modules allow you to configure each application according to the needs of your organization :

Solution-specific administration modules	
Sharing Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Work_share and Oodrive Work • Configuration of options for sharing and collaboration applications • Monitoring of user activities Access documentation
Work Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Work • Teamspace management Access documentation
Backup Management 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Save • Configuration of savesets and backup policies for your user base Access documentation
Oodrive Media Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Media • Configuration of the Media Library application Access documentation
Oodrive Meet Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Meet • Configuration of meeting options Access documentation

An administrator guide is available for each of these modules in order to assist you in configuring your workspace, depending on your role.

Please note: Only Oodrive technical support can be responsible for assigning and modifying administration rights. As a result, the administration modules to which you have access depend on the configuration defined by Oodrive support and its main point of contact within your company.

1.1. Compatibility

Oodrive solutions run on different operating systems and browsers. You will find the list of compatible versions below:

Operating systems

- **Windows**

Operating systems covered by Microsoft standard support (Cf. Windows lifecycle: <http://windows.microsoft.com/en-us/windows/lifecycle>)

- **MacOs et iOS**

Major versions n and n-1 (current and previous)

- **Android**

Major versions n and n-1 (current and previous)

Web browsers

- **Microsoft Edge, Google Chrome and Mozilla Firefox**

Major versions n and n-1 (current and previous)

- **Safari**

Latest major version available on a compatible Apple operating system

Other software

- **JRE (for applets)**

JRE (and JDK) supported by Oracle on their respective operating systems

- **Microsoft Outlook**

Versions covered by Microsoft standard support

Please visit the following web page on Oodrive Save software compatibility:

- <https://www.adbackup-help.com/en/wp-content/uploads/sites/2/compatibility-guide-oodrive-save.pdf>

The Oodrive Save solution is compatible with the .NET Framework v4.5.2 and the TLS 1.2 protocol. TLS versions 1.0 and 1.1 are no longer supported.

Please also note that only versions 7.4 and later of the Oodrive Save PC client respond to actions performed in the Backup Management module.

1.2. Log in to your workspace

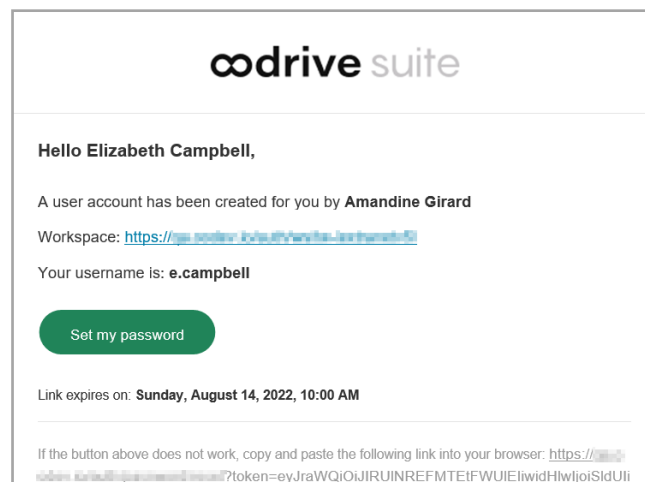
There are two ways to log in to your workspace:

- using your Oodrive login credentials
- using your company login credentials

The login options available on your workspace depend on your Access Management module settings.

Log in with your Oodrive login credentials

1. Retrieve the username emailed to you when your account was created and click **Set my password**.



2. You will be redirected to a browser page asking you to set a password and confirm it before clicking **Validate**.
3. Click **Log in** to access the login page.

Please note: If the Oodrive login field is not displayed, click **Log in using your login credentials** to access it.

4. Enter your username and click **Next**.

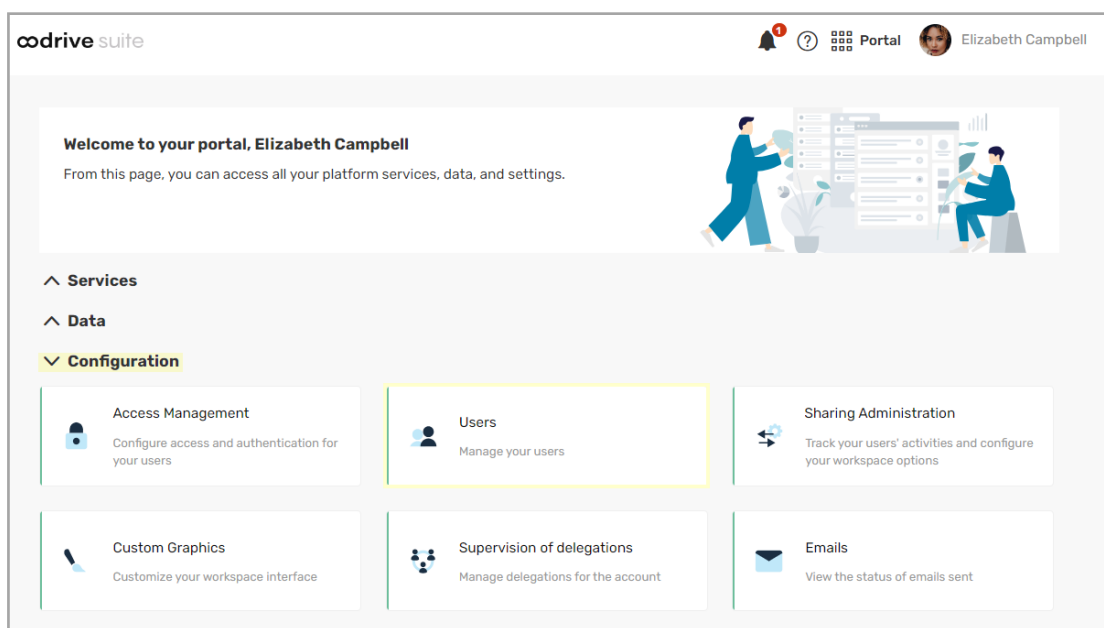
5. Enter the password you have just specified, then click **Log in**.

Careful: After 5 failed login attempts, a security code will automatically be sent via email. This code will be required in addition to your password.

If you have forgotten your password, click **Forgot your password?**

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

6. Next, you will access the Oodrive Suite portal, where you will find all the applications and configuration modules to which you have access.



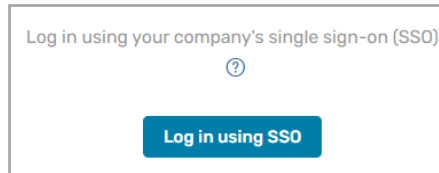
To return to the portal at any time, click on  in the upper-right corner of the page, then select **Portal**.

Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

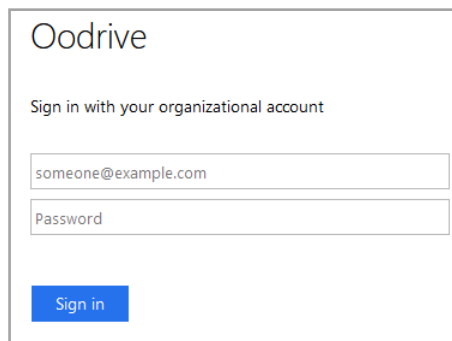
Log in with your company login credentials

1. Click the **Log in using SSO** button.



If the button is not available, click **Log in using your company's single sign-on (SSO)**

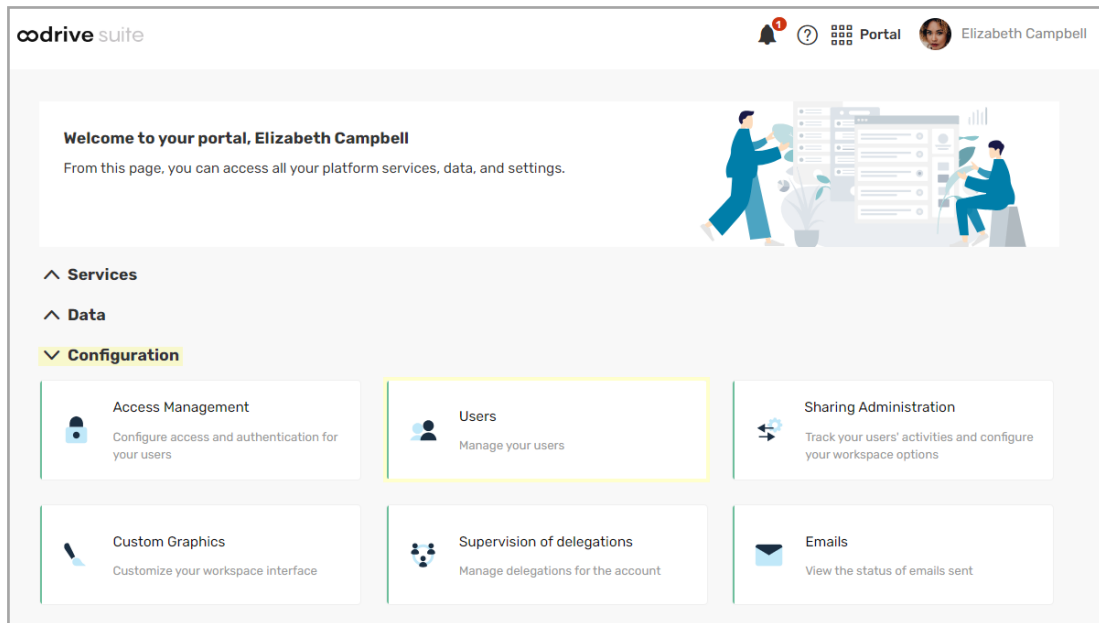
2. Enter your company login credentials and click **Log in**.


A screenshot of the Oodrive login form. It has the Oodrive logo at the top. Below it, the text 'Sign in with your organizational account' is displayed. There are two input fields: the first contains the placeholder 'someone@example.com' and the second is labeled 'Password'. At the bottom left, there is a blue button labeled 'Sign in'.

If you have forgotten the password associated with your company username, please contact your company's IT administrator.

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

- Next, you will access the Oodrive Suite portal where you will find all the applications and configuration modules to which you have access.



To return to the portal at any time, click on  in the upper-right corner of the page, then select **Portal**.

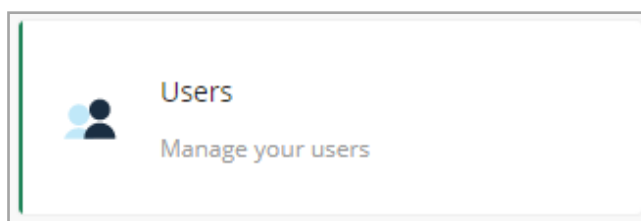
Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

1.3. Overview of the Users module

As a user with administrative rights, you are responsible for creating, managing and configuring user accounts for your workspace.

Create	Manage	Configure
<ul style="list-style-type: none"> • Create new accounts based on the needs of each employee • Allow them to access your workspace applications 	<ul style="list-style-type: none"> • Modify employee user profiles and allocated storage quotas • Suspend accounts • Reopen accounts • Close accounts 	<ul style="list-style-type: none"> • Configure basic settings relating to account suspension, restrictions and notifications

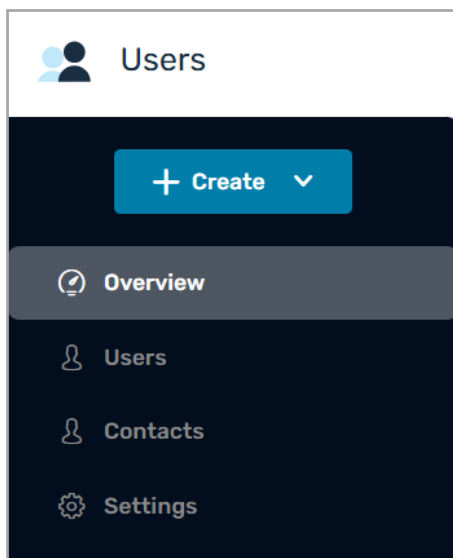


Please note : While you are responsible for opening, suspending and closing accounts for users with administrative rights, only the Oodrive Technical Support team has the ability to assign administrative rights to users.

Any request to assign or modify the users responsible for administrating Oodrive Suite configuration modules must be communicated to Oodrive in order to be processed.

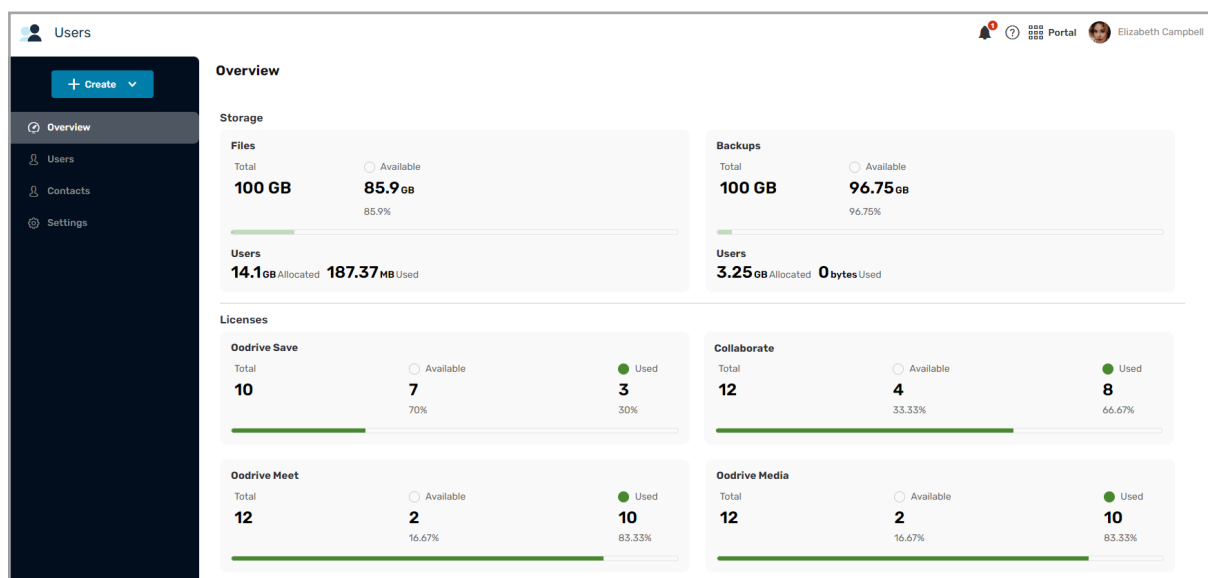
1.4. Browse the Users Module

In the navigation panel along the left side of the page, you can quickly access each section of the Users Module.



1.5. View available storage and licenses

The **Overview** section allows you to keep track of available storage space and licenses for each of your workspace solutions:



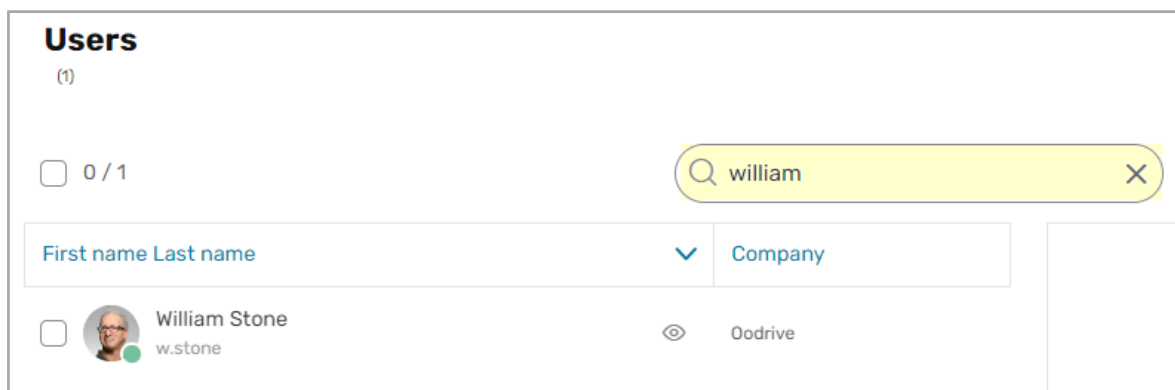
Note : To add licenses or additional storage to your workspace, contact your sales representative.

1.6. Search for a User or Contact

To quickly search for a workspace User or Contact, you can use the search bar in the upper-right corner of the **Users** and **Contacts** sections.

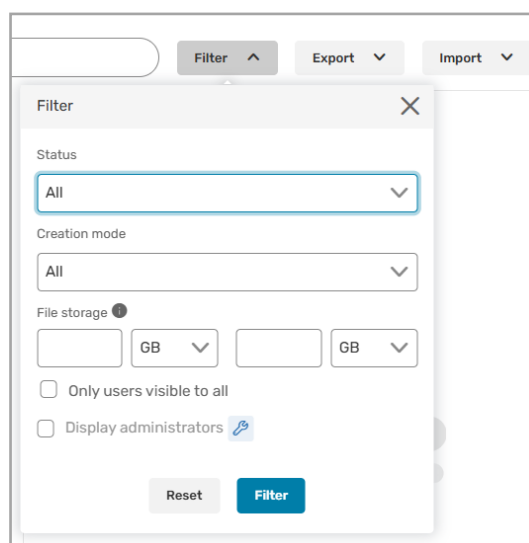
You can search by:

- Username,
- First or last name,
- Company
- Account owner (when searching for a Contact).







1.7. Filter accounts

Filter the list of Users or Contacts from the **Filter** button to verify the status of your workspace accounts. You can also filter by available storage space (e.g. between 1 and 10 GB), account creation mode and/or by visibility.



To return to the view of all Users or Contacts, click the **Reset** button in the filter menu.

1.8. Account statuses

<p>Awaiting validation</p> 	<ul style="list-style-type: none"> • An account 'awaiting validation' is not yet active and cannot connect to your company's workspace. • This temporary status is associated with requests to create an account which have not yet been accepted by an administrator. • An account 'awaiting validation' does not consume any license or storage space.
<p>Open</p> 	<ul style="list-style-type: none"> • An 'open' account is by definition an active account. • Every 'open' user account consumes a subscription license to which storage space may be attributed.
<p>Suspended</p> 	<ul style="list-style-type: none"> • A 'suspended' account is an account on standby that cannot connect to your company's workspace. • This status allows Users to keep all of their data and workspace history until their account is reopened at a later date. • A 'suspended' account continues to consume a license and its allocated storage space. • Files shared by the user remain accessible to recipients.
<p>Closed</p> 	<ul style="list-style-type: none"> • A 'closed' account can no longer access your company's workspace. • The closing of an account can be scheduled at any time. • A closed account does not consume any license. • Whether the account consumes storage space depends on the data still present on the account: <ul style="list-style-type: none"> • The 'closed' status ensures that all of the account data and history is retained for a period of three months. <p>Thus, if you have not manually deleted or transferred the account data before closing, then the user data is kept and the account continues to consume storage space during this time.</p> <p>Once the three-month period has passed, the account data may be deleted.</p> • If an administrator has transferred the account data to another account or if the account owner has deleted their own files prior to the closing, then the account will not consume any storage space.

Careful: Suspending or closing a User account will automatically:

- suspend the delegations it created,
- close the Contacts accounts for which it is the owner.

If the User account is reactivated, its Contacts and delegations will also be reactivated.

If your account is suspended or closed and there is no other administrator with an access to the **Users** module for your workspace, contact Oodrive Technical Support team. In the event that your company's subscription expires, contact your sales representative.

1.9. Authentication modes

Logging in to the workspace

Depending on your Access Management module settings, two authentication modes may be available on your workspace:

- authentication via oodrive credentials
- authentication via company credentials (LDAP, SAML, Kerberos, OpenID Connect)

These two authentication modes can coexist on your workspace, or the Access Management module Administrator can choose to enforce one authentication mode for all users.

Please note: If authentication via company credentials has been configured, user account provisioning may be automated.

Authentication options

In addition to the main authentication modes, authentication options such as **passwordless authentication** or **two-factor authentication** may be configured on your workspace.

If one of these options is enabled, for each user you will be able to select a security code or key to use in addition to or instead of their login credentials. Three authentication modes are available for this purpose:

- SMS security code
- TOTP security code
- Yubikey security key

For more information, please refer to the [Access management](#) module documentation.

2. Creating new accounts

2.1. Account types

When you create new accounts for colleagues on your workspace, you have the choice between two types of accounts: the **User** account and the **Contact** account.

Please note: The Contact account type is mainly used by the Oodrive Work_share and Oodrive Work applications. If neither of these applications is available on your workspace, it is not necessary for you to create Contact accounts.

Users	Contacts
<p><i>The User account type is suitable for anyone who needs to access all application features available on your workspace.</i></p> <ul style="list-style-type: none"> • <i>Each User consumes a license and can be allocated storage space.</i> • <i>A User can access and use any application available on your workspace, provided that they have the necessary license(s).</i> • <i>A User can have public or private Contacts.</i> • <i>Oodrive Technical Support can assign Users administrative rights to the three configuration modules: Authentication / Users / Sharing.</i> 	<p><i>The Contact account type is suitable for anyone who simply needs to access the workspace to interact with items made available to them by Users.</i></p> <ul style="list-style-type: none"> • <i>Contact accounts do not consume licenses.</i> • <i>A Contact can be created with or without a user name.</i> • <i>A contact cannot access the Oodrive Media, Oodrive Save and Oodrive Meet applications.</i>

Special case: restricted permissions

This section is dedicated to administrators of Oodrive Work.

The Oodrive Work solution allows you to restrict a User account's permissions on teamspace.

Once enabled for a User account, this option will :

- prevent them from creating teamspaces (public or private).
- prevent them from viewing and requesting to join public teamspaces.

These restrictions are particularly suitable for people external to your organization or profiles requiring a limited scope of action.

Description of account scopes			
	User account	User account with restricted permissions	Partner account (Contact)
Create a teamspace	•		
View the list of public teamspaces	•		
Join an open access public teamspace	•		
Request to join a public teamspace that requires validation	•		
Be invited to a public or private teamspace	Can join or be added to an unlimited number of teamspaces	Can be added to an unlimited number of teamspaces	Can be added to only one teamspace at a time
Obtain the Guest or Contributor role	•	•	•
Obtain the Owner role	•	•	
Access My space	•	•	

2.2. Create a new account

1. In the navigation panel on the left side of the page, click **Create** and select the account type to create: **User** or **Contact**.

Note: If you only own the Oodrive Save or Oodrive Media, you will only be able to create User accounts, via the **Create a user** button.

2. You must complete all required fields regarding the person for whom you are creating the account:

- **First and last name**
- **Email address**
- **Username**(optional for Contacts)

Note: If you want to create a **Partner** account in Oodrive Work, you need to enter a login for your Contact and make the account visible to others. Once authenticated, your Contact will be able to access the collaborative shares and the teamspace made available to them.

- **Account status** ("open" by default)
- **Two-factor or passwordless authentication** (if the option is enabled)

Careful: If the use of an SMS code has been activated, a mobile phone number must be provided. Likewise, if the security key is activated, the user must have a Yubikey device at their disposal.

- **Email message language preference**
- **The owner of the Contact**

You can also fill in the optional fields as needed and assign additional applications to your users if you have the necessary licenses.

3. If you would like to make the account visible to all workspace users, you must check the option **Visible to other users**.

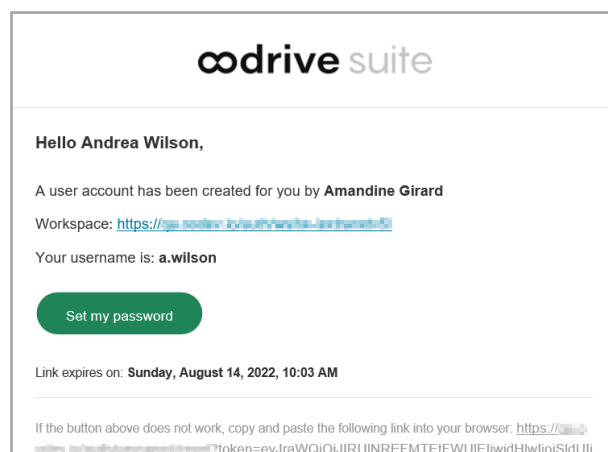
Note: In the Oodrive Work solution, User and Contact accounts must be visible to others in order to participate in teamspaces.

4. When creating a **User** account for the Oodrive Work application, you can check the **Restricted permissions** option if you want to limit the scope of action of this User.

For more information on restricted permissions, please refer to the section "[Special case: restricted permissions](#)" on page 17.

- If automatic account suspension is activated for your workspace, you can prevent this account from being suspended by checking the **Prevent automatic account suspension** option.
- Click **Save**.

An email notification will be automatically sent to each colleague to inform them that a new account has been created in their name, unless you deselect the **Send creation email** option.



To access created accounts, click **Users** or **Contacts** in the navigation panel along the upper-left side of the page.

2.3. Create accounts in bulk

Importing using CSV or XLSX file types allows you to automate the creation of new accounts. Two pre-filled file templates are available - **the Users template** and **the Contacts template** - allowing you to quickly prepare the import file with all the personal details and account options for each of your workspace colleagues.

If your workspace has both User and Contact accounts, you must follow the following steps:

Step 1: Make two separate lists identifying those individuals requiring a Contact or User account.

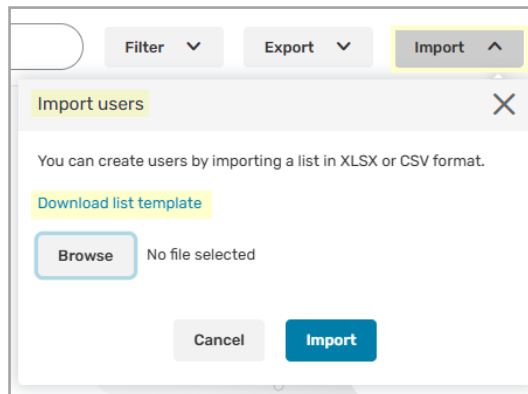
Step 2: First prepare the Users template for import.

Users will be able to access all workspace application features and will have their own list of Contacts (which may be visible or hidden to other Users).

Step 3: Prepare the Contacts template for import by associating each Contact with a User. You must also choose whether each account should be made visible on the workspace.

Import a list of Users

1. In the navigation panel on the left side of the page, click the **Users** section.
2. Click **Import** in the upper-right side of the page.
2. Click **Download list template** to start downloading the list template in XLSX format in your browser.



3. Open the file and fill out each line with the required information for each of your users, based on the pre-filled examples in each column. Below is a table providing explanations to help guide you in preparing the XLSX file.

Key	Explanation
LASTNAME*	Required field
FIRSTNAME*	Required field
EMAIL*	Required field
STATUS*	Required field Three account statuses are possible: ACTIVE / INACTIVE / CLOSED (active, inactive, closed)
LOGIN*	Required field Various formats are allowed: last name.first name/ first name.last name / firstname.lastname@company.com
MAIL_LANGUAGE*	Required field

Key	Explanation
	The preferred email notification language: en / to / of / nl / are / it / pt - br / zh - cn / ja / th
SHARE_SPACE_MAX*	<p>Required field for Oodrive Work, Oodrive Work_share and Oodrive Meet users.</p> <p>If you are not implementing any of the solutions listed above, you can leave this field blank.</p> <p>The storage space allocated to the user:</p> <p>GB = Gigabyte</p> <p>KB = Kilobyte</p>
SAVE_SPACE_MAX*	<p>Required field for Oodrive Save</p> <p>If you are not implementing Oodrive Save, you can leave this field blank.</p> <p>The storage space allocated to the user:</p> <p>GB = Gigabyte</p> <p>KB = Kilobyte</p> <p>Careful: When implementing Oodrive Save, you must allocate at least 1 Gigabyte of storage space to your users.</p>
VISIBILITY_SCOPE	<p>The visibility of the user to others on the platform: PUBLIC / PRIVATE (public or private)</p> <p>Important: If you are implementing Oodrive Save or Oodrive Media, enter "PUBLIC". When implementing Oodrive Work, also enter "PUBLIC" for accounts which need access to teamspaces.</p>
MODIFICATION_PREVENTION	<p>Two options are possible: YES / NO</p> <p>If you put "YES", the user will not be able to edit their profile information.</p> <p>Prerequisite: You must also activate this option in the Settings.</p>
COMPANY	The company of the person associated with the account

Key	Explanation
COMPANY_ DEPARTMENT	The Department of the person associated with the account
FUNCTION	<ul style="list-style-type: none"> The job position of the person associated with the account
TFA	<p>Passwordless or two-factor authentication, depending on the Access Management module settings</p> <p>Four possible options:</p> <p>TOTP / NONE / SMS / FIDO2</p> <p>TOTP = temporary code (time-based one-time password)</p> <p>NONE = none</p> <p>SMS = the code received via SMS, available if the SMS module has been set up for your workspace</p> <p>FIDO2 = Yubikey security key and PIN</p> <p>Careful: If you specify an authentication mode (TOTP, SMS or FIDO2), it will not take effect until activated in the Access management module.</p>
CITY	The city of the person associated with the account
ADDRESS	The address of the person associated with the account
ZIPCODE	The postal code of the person associated with the account
COUNTRY	The country of the person associated with the account
PHONE	<p>The <u>mobile</u> phone number of the person associated with the account</p> <p>Careful: When authentication via SMS is enabled, you must complete this field, otherwise the employee will not be able to log in to the platform until you enter their correct mobile phone number.</p>
BIOGRAPHY	The biography of the person associated with the account
CREATION_DATE	This field is automatically filled during import
SUSPENSION_DATE	On this date, the account status will change to ' INACTIVE ' (suspended): dd/mm/yyyy/hh:mm

Key	Explanation
CREATION_NOTIFICATION	<p>Two possible options: YES or NO</p> <p>If you put 'YES', the user will receive an email when their account is created.</p> <p>Careful: To perform a silent install of Oodrive Save, enter "NO".</p>
EXPIRATION_MODE	<p>Two possible options: DEFAULT or DISABLED</p> <p>If you enter "DEFAULT", automatic suspension and expiration of the account will trigger when the criteria set in the "Settings" section of the Users module are met.</p> <p>If you enter "DISABLED", the account suspension and expiration will never occur automatically.</p>
RESTRICTED_RIGHTS	<p>Two possible options: YES or NO</p> <p>If you put 'YES', the user will have a user account with restricted permissions.</p> <p>For more information on restricted permissions, please refer to the section "Special case: restricted permissions" on page 17.</p>

Note: It is very important that you follow the language and formatting of pre-filled items in the form to avoid errors when importing.

- Once you've completed the form, according to the formats provided and taking care to fill in all required fields, save the file to your computer.
- Return to the **Import** button in the top-right part of the page and click **Browse** to select the file saved on your computer.
- Click **Import** along the bottom of the menu.

Below is an example of a list of Users viewed after completing the import.

Users (9)

0 / 9

First nameLast name

AP

Ashley Peterson

a.peterson

CM

Connor Murphy

c.murphy

JS

Jerry Sanders

j.sanders

MG

Mary Gordon

m.gordon

SB

Samantha Barnes

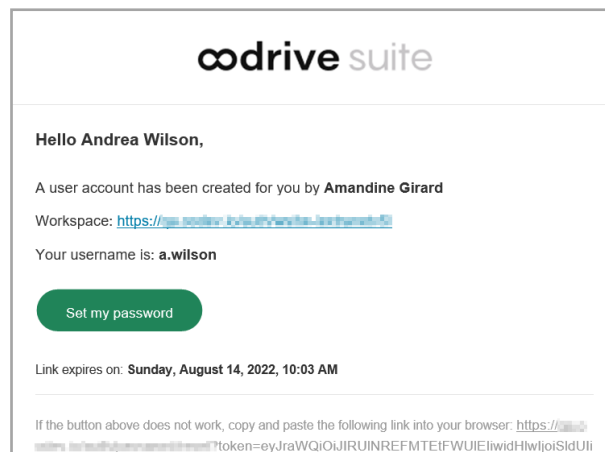
s.barnes

TJ

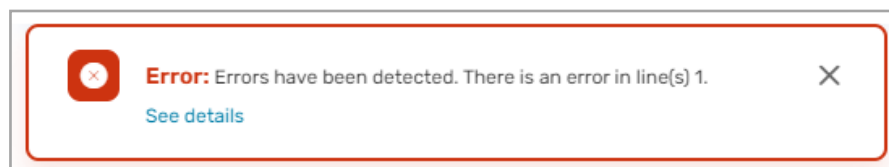
Thomas Johnson

t.johnson

If you enabled this option, an email notification will be automatically sent to each colleague to inform them that a new account has been created in their name:



If an error occurs, you will see the following error message. Click **See details** to view the error details.

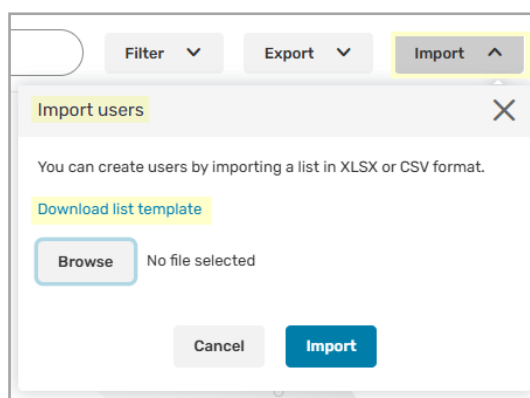


In the error details, the cells containing errors are identified with a description of the error type so that you can correct each one and reimport the file.

Error details		
Cell	Field	Error type
O2	visibility	Visibility must be PUBLIC or PRIVATE
P2	tfa	The two-factor authentication type is invalid
V2	status	Invalid status

Import a list of Contacts

1. In the navigation panel on the left side of the page, click the **Contacts** section.
2. Click **Import** in the upper-right side of the page.
3. Click **Download list template** to start downloading the list template in XLSX format in your browser.



4. Open the file and fill out each line with the required information for each of your contacts, based on the pre-filled examples in each column. Below is a table providing explanations to help guide you in preparing the XLSX file.

Key	Explanation
OWNER_LOGIN *	<p>Required field</p> <p>Every Contact belongs to a User account. You must enter their username</p>
LASTNAME *	<p>Required field</p>

Key	Explanation
FIRSTNAME *	Required field
EMAIL *	Required field
STATUS *	Required field Two account statuses are possible: ACTIVE / CLOSED
LOGIN	Various formats are allowed: last name.first name/ firstname.lastname / firstname.lastname@company.com
VISIBILITY_SCOPE *	The visibility of the Contact to others: PUBLIC / PRIVATE (public or private)
MODIFICATION_PREVENTION	Two options are possible: YES / NO If you put " YES ", the contact will not be able to edit their profile information. Prerequisite: You must also activate this option in the Settings .
COMPANY	The company of the person associated with the account
COMPANY_DEPARTMENT	The Department of the person associated with the account
FUNCTION	The job position of the person associated with the account
TFA	Passwordless or two-factor authentication, depending on the Access Management module settings Careful: If you specify an authentication mode (TOTP, SMS or FIDO2), it will not take effect until activated in the Access management module. Four possible options: TOTP / NONE / SMS / FIDO2 TOTP = temporary code (time-based one-time password) NONE = none SMS = the code received via SMS, available if the SMS module has been set up for your workspace

Key	Explanation
	FID02 = Yubikey security key and PIN Careful: If a Contact needs access to Oodrive Sign only, indicate " NONE ".
CITY	The city of the person associated with the account
ADDRESS	The address of the person associated with the account
ZIPCODE	The postal code of the person associated with the account
COUNTRY	The country of the person associated with the account
PHONE	The mobile phone number of the person associated with the account Careful: When authentication via SMS is enabled, you must complete this field, otherwise the employee will not be able to log in to the workspace until you enter their correct mobile phone number.
BIOGRAPHY	The biography of the person associated with the account
MAIL_LANGUAGE *	Required field The preferred email notification language: en / to / of / nl / are / it / pt - br / zh - cn / ja / th
CREATION_DATE	This field is automatically filled during import
SUSPENSION_DATE	On this date, the account status will change to ' INACTIVE ' (suspended): dd/mm/yyyy/hh:mm
OWNER_FIRSTNAME	Every Contact belongs to a User account. You must enter that User's first name.
OWNER_LASTNAME	Every Contact belongs to a User account. You must enter that User's last name.
CREATION_NOTIFICATION	Two possible options: YES or NO If you put ' YES ', the user will receive an email when their account is created. Careful: If a Contact needs access to Oodrive Sign only, indicate " NONE ".

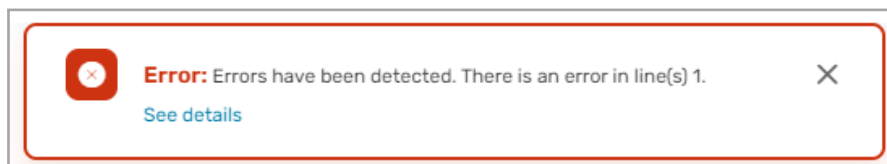
Note: It is very important that you follow the language and formatting of pre-filled items in the form to avoid errors when importing.

5. Once you've completed the form, according to the formats provided and taking care to fill in all required fields, save the file to your computer.
6. Return to the **Import** button in the top-right part of the page and click **Browse** to select the file saved on your computer.
7. Click **Import** along the bottom of the menu.

Below is an example of a list of Contacts viewed after completing the import.

<input type="checkbox"/> 0 / 10			
First name	Last name	Company	Owner
<input type="checkbox"/> JW	Jacob Waters j.waters	Oodrive	Elizabeth Campbell
<input type="checkbox"/> JR	James Roberts j.roberts	Oodrive	Elizabeth Campbell
<input type="checkbox"/> JL	Janet Longfellow j.longfellow	Oodrive	Elizabeth Campbell
<input type="checkbox"/> JT	Jared Tanner j.tanner	Oodrive	Elizabeth Campbell
<input type="checkbox"/> JW	Jennifer Walker j.walker	Oodrive	Elizabeth Campbell
<input type="checkbox"/> JW	Joseph Wilson j.wilson	Oodrive	Elizabeth Campbell

If an error occurs, you will see the following error message. Click **See details** to view the error details.



In the error details, the cells containing errors are identified with a description of the error type so that you can correct each one and reimport the file.

Cell	Field	Error type
O2	visibility	Visibility must be PUBLIC or PRIVATE
P2	tfa	The two-factor authentication type is invalid
V2	status	Invalid status

3. Managing requests to create an account

If requests to create an account have been enabled on your workspace, colleagues who do not yet have a User account can create a request, which you can decide whether to validate.

To create a request, your colleagues will have to follow the steps listed below.

Step 1: Access the request form

Go to the workspace login page and click **No account yet? Request your account**.

Step 2: Fill in user information

Enter your last name, first name, email address and username, then click **Submit**.

Step 3: Define a password

Once the request has been accepted by an administrator, the user receives an email allowing them to define their password.

Note: This feature is only available for Oodrive Media and needs to be enabled by Oodrive Support.

3.1. Accept a request

1. In the navigation panel on the left side of the page, click the **Users** section.
2. To view the list of accounts awaiting validation, click **Filter** in the upper-right corner of the page.
3. In the **Status** drop-down list, select **Awaiting validation**, then click **Filter**.
4. Click on a user to view their request.

The screenshot displays the 'Users' management section in Oodrive. On the left, a list of users is shown with columns for 'First name Last name' and 'Company'. The user 'Connor Murphy' is highlighted. On the right, a detailed view of Connor Murphy's account request is shown, including a profile picture, name, email, and a message stating 'Connor Murphy requested an account validation on Apr 22, 2024'. Below this message are 'Refuse' and 'Confirm' buttons. The status at the bottom is 'Awaiting validation'.

First name Last name	Company
Ashley Peterson	a.peterson
Connor Murphy	c.murphy
Kelly Watson	k.watson
Samantha Barnes	s.barnes

Connor Murphy requested an account validation on Apr 22, 2024

Status: ● Awaiting validation

5. To accept the request without making changes to the user file, click **Confirm**.

- The account is created and an email allowing the user to set their password is sent automatically.

To make changes to the user file before accepting the request, click **Edit**.

- Make your changes in the user file, then activate the new account by selecting the **Open** status in the **Status** field.
- Click **Save**.
- Click **Reset password** to send the email allowing the user to set their password.

Note: To remove your filters and display the full the user list, click **Filter**, then **Reset**.

3.2. Deny a request

1. In the navigation panel on the left side of the page, click the **Users** section.
2. To view the list of accounts awaiting validation, click **Filter** in the upper-right corner of the page.
3. In the **Status** drop-down list, select **Awaiting validation**, then click **Filter**.
4. Click on a user to view their request.
5. Click **Refuse**.

The request is denied and the user is removed from the list of accounts awaiting validation.

4. Modifying an existing account

You can modify the profile, settings, and account status of each User and Contact on your workspace. Changes can be made at the individual profile level or in bulk, by performing an export-import of accounts in XLSX or CVS formats.

Note: Once the account has been created, you can no longer change its owner.

The employee profile

- Photo
- Last and first names
- Company
- Department and position
- Business contact information
(email, address, phone)

The account settings

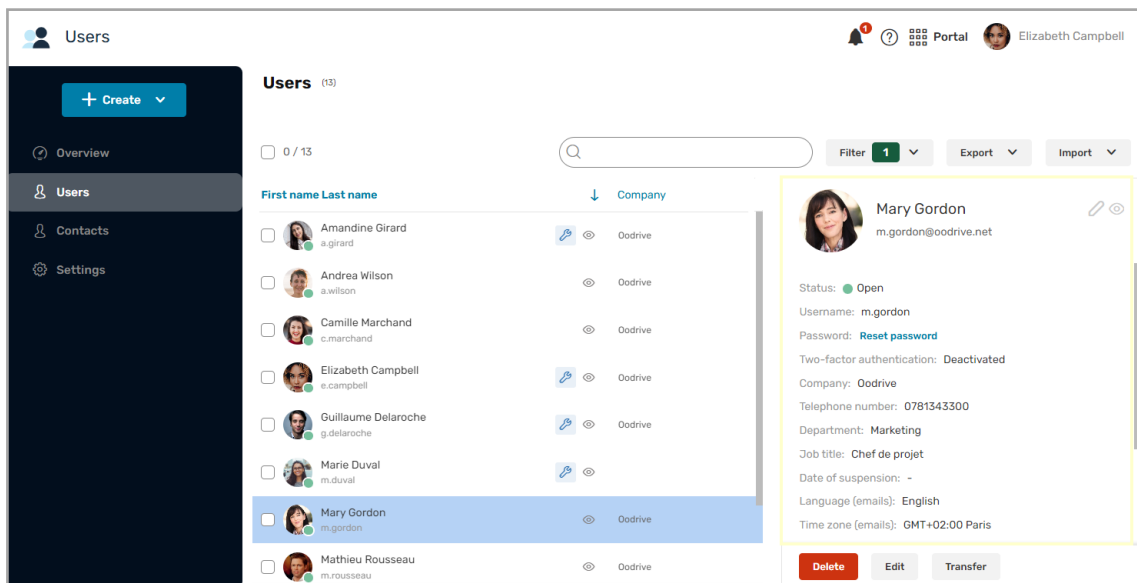
- Username
- Password reset
- Authentication mode
- Automatic suspension date
- Language and email time zone
- Storage allocated to the User
- Application assigned to the User (if you have subscribed to several Oodrive solutions)
- Account visibility

4.1. Modify an individual account

Modify a colleague's profile, account settings, or status at any time by accessing their User or Contact file.

Note: Once a Contact account has been created, you can no longer change its owner.

1. In the **Users** or **Contacts** section, click on the name of the person whose account you would like to modify.
2. A side panel appears on the right, click **Edit** in the lower-right corner of the page.



3. Modify the fields as desired and click **Save**.

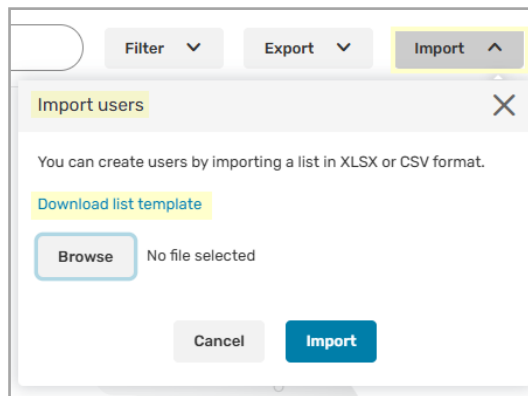
4.2. Modify accounts in bulk

Modify several colleagues' profiles, account settings, or statuses at the same time by performing an export-import of accounts in XLSX or CVS formats. You must perform this action separately when modifying User versus Contact accounts, as the required fields are not the same.

Note: The account username and email time zone are two fields that can only be changed by directly modifying the account. Additionally, once the account has been created, you can no longer change its owner.

1. In the navigation panel on the left side of the page, click the **Users** or **Contacts** section.
2. Click **Export**, then click on the drop-down menu and select a file format (Excel or CSV).
3. Click **Export** to start downloading the list template in the selected format in your browser.
4. Open the file and save it to your computer.

5. Edit the file by following the language and format of the pre-filled items in the form to avoid errors when importing.
6. Once you have edited the file, save it to your computer.
7. Return to your browser page , ensuring that you go back to the page that corresponds to the account type that you are changing (Users or Contacts).
8. Click **Import** in the upper-right section of the page, then click **Browse** to select the file saved on your computer.

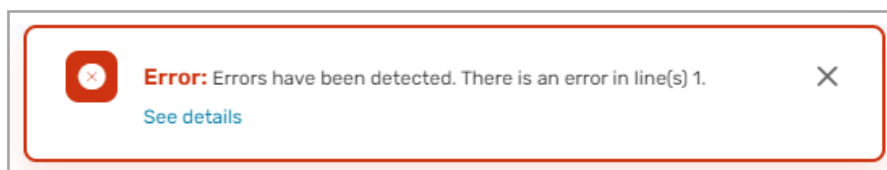


9. Click **Import** along the bottom of the menu.

Below is an example of a list of users viewed after completing the import.

Users (9)		
<input type="checkbox"/> 0 / 9		
First name	Last name	
<input type="checkbox"/> AP	Ashley Peterson a.peterson	
<input type="checkbox"/> CM	Connor Murphy c.murphy	
<input type="checkbox"/> JS	Jerry Sanders j.sanders	
<input type="checkbox"/> MG	Mary Gordon m.gordon	
<input type="checkbox"/> SB	Samantha Barnes s.barnes	
<input type="checkbox"/> TJ	Thomas Johnson t.johnson	

If an error occurs, you will see the following error message. Click **See details** to view the error details.



In the error details, the cells containing errors are identified with a description of the error type so that you can correct each one and reimport the file.

Error details		
Cell	Field	Error type
O2	visibility	Visibility must be PUBLIC or PRIVATE
P2	tfa	The two-factor authentication type is invalid
V2	status	Invalid status

4.3. Transfer data from one User account to another

Prerequisite: This feature is exclusive to Oodrive Work and Oodrive Work_share. To avoid any errors during data transfer, this feature will not be available to users with other licenses, even if they also use Oodrive Work or Oodrive Work_share.

In order to benefit from this feature, users must meet the following conditions:

- Have an Oodrive Work or Oodrive Work_share license
- Not have any license for Oodrive Meet, Oodrive Media or Oodrive Save

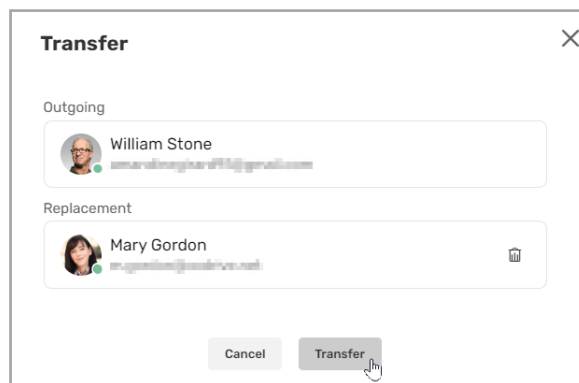
To prevent data loss from employee turnover, the Oodrive Platform allows you to transfer data from one User account to another.

Thus, when an employee leaves the organization and their scope of activities is to be transferred to a replacement, the latter will be able to recover all the data from their predecessor's account:

- **files and folders**
 - Storage space allocated to the outgoing account is transferred to the replacement's account.
 - Items inherited from the outgoing account are placed within a folder at the root of the file manager.
- **shares sent**
- **contacts and contact groups**
- **administration modules**

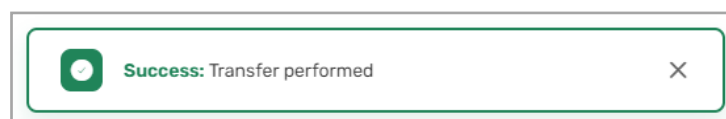
Prerequisite: In order to transfer data from an employee's account, you must first create a User account for their replacement.

1. In the navigation panel on the left side of the page, click on the **Users** section.
2. Select the User whose data you want to transfer.
3. In the panel on the right, click **Transfer**.
4. In the transfer window, select their replacement, then click **Transfer**.




A transfer summary is displayed on the screen, allowing you to view the data and administration modules that will be transferred.

5. Click again on **Transfer** to launch the process. This may take a few moments.
6. You will receive the confirmation message below confirming that the transfer has been successful:



When the transfer is complete, the outgoing account is emptied of its data and suspended. The account owner receives an email informing them of the data transfer and the suspension of their account.

The replacement is also informed of the data transfer performed to their benefit.

Note: To help you identify accounts whose data has been transferred, those will be marked with the  icon in the user list.

4.4. Delete an account

Deleting a User's account will permanently delete all of their data and related items (contacts, shares, backups, meetings, etc.).

Only the User's account history will remain available to the administrator responsible for managing workspace activity in the Activities and Sharing Administration modules.

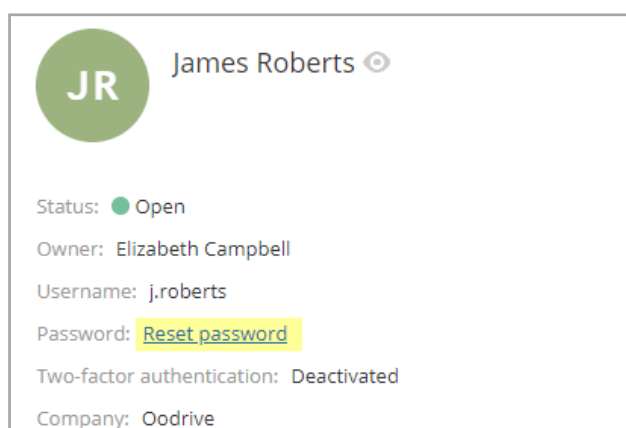
Careful: This action is irreversible. If you ever need the account at a later date, you will have to create it again, and you will not be able to restore data from the deleted account. An alternative to deletion is to suspend the accounts of inactive Users.

1. In the **Users** or **Contacts** section, check the box to the left of the colleague's name.
2. Then, click **Delete**, in the lower-right corner of the page.
3. Confirm your action by clicking **Delete** again.

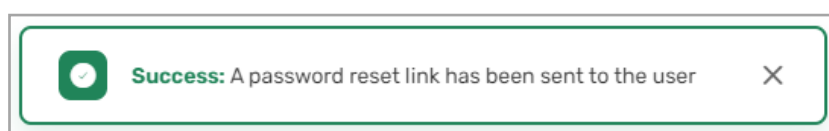
4.5. Reset a password

By default, colleagues can change their password from their profile. However, you can perform the password reset at any time. This is particularly useful when changing the email address associated with the account.

1. In the **Users** or **Contacts** section, click on the name of the person whose password you would like to reset.
2. In the side panel on the right, click on the **Reset password** link.



3. You will receive the confirmation message below confirming that a password reset email has been sent.



When the recipient clicks the reset link received in the email, they are redirected to a browser page prompting them to set a new password.

4.6. Reset an authentication mode

If a user has lost or changed the security key or mobile device used to log in to their workspace as part of two-factor or passwordless authentication, you can reset their authentication mode.

Reset a temporary code (TOTP code)

Once the TOTP code has been reset, the user will be able to reassociate the mobile authentication app on their new device with the workspace.

1. Click the name of the person for whom you want to reset the TOTP code.
2. In the side panel on the right, go to **Temporary code – Reset**.
3. Click **Reset**.

Reset a security key

Once the security key has been reset, the user will be able to reassociate a new security key with the workspace.

1. Click the name of the person for whom you want to reset the security key.
2. In the side panel on the right, go to **Security key – Reset**.
3. Click **Reset**.

5. Configuring advanced settings

As a User responsible for administrating user provisioning, you can configure several advanced settings for the Users and Contacts of your workspace.

- Account suspension and closure
- Restrictions
- Email addresses
- Storage
- Default language

5.1. Automatic suspension

You have the option to activate the automatic suspension of accounts on which there has been no login activity for some time in order to maintain better control over workspace access. Suspending an account allows you to keep all of the User's data and history on the workspace until the account is reopened at a later date.

- Automatic suspension applies to all accounts, including Users with administrative rights.
- If the suspended user owns Contacts, their accounts will be closed.
- If the suspended user has created delegations, these will be suspended and his delegates will no longer be able to access his account.

If enabled, the inactive account holder will receive a notification before their account is suspended and if you would like, you can also to be notified to stay informed.

Recommendation : If a delegator account is mainly active via its delegates, we recommend that you activate the **Prevent automatic account suspension** option in the user file, to avoid automatic suspension.

Receive suspension notifications

By default, no notifications will be sent to make you aware of account suspensions. If you would like to be notified when accounts are suspended, you must enable this option.

1. Click on the **Settings** section.
2. In the **Account suspension** section, check the option **Notify workspace managers when a user account is suspended**.
3. Click **Save** along the bottom of the page.

Enable automatic suspension

1. Click on the **Settings** section.
2. In the **Account suspension** section, check the option **Enable automatic suspension of inactive accounts**.
3. Set the time limit before suspending inactive accounts.
 - 1 to 6 months or 1 year after the account is marked as inactive
4. You must also select when you would like the email alert to be sent to the account holder of the suspended account.
 - the email will be sent out one or two weeks before the account is suspended
5. Click **Save** along the bottom of the page.

Enable automatic closure

1. Click on the **Settings** section.
2. In the **Account suspension** section, check the option **Enable automatic closure of suspended accounts**.
3. Set the time limit before closing suspended accounts.
 - 1 to 6 months or 1 year after account suspension
4. Click **Save** along the bottom of the page.

5.2. Profile modification

By default, workspace users have the ability to edit their profile. The following information can be modified at any time:

- Email
- Username
- Password
- Phone
- Company
- Department
- Default language

- Time zone
- Mailing address

However, if you would prefer to lock the profile information of certain individuals, you can choose to prevent profile editing.

1. Click on the **Settings** section and go to **Restrictions**.
2. if you want to be able to manage modification settings for profile information on the user form of each colleague, make sure that the **Allow users to modify their personal information** setting is selected.
3. Next to **Default modification**, select the behavior you want to apply by default:
 - Check **Blocked** to prevent users from modifying their profile information.
 - Check **Authorized** to allow users to modify their profile information.

This behavior will be applied by default for all new users created on your workspace. However, you can still choose to modify it in the user form of each individual user.

Note: if you want to block the modification of profile information for all users of your workspace without distinction, de-select the **Allow users to modify their personal information** setting.

4. Click **Save** along the bottom of the page.

When the **Allow users to modify their personal information** setting is enabled, you can prevent or allow modification of profile information for the colleagues of your choice, individually or on a massive scale:

User form		File template (XLSX)		
<div>New user</div> <div> <input checked="" type="checkbox"/> Block editing of personal information </div>				
		G	H	I
		1 STORAGE	VISIBILITY_SCOPE*	MODIFICATION_PREVENTION
		2 256 mo	PUBLIC	YES
		3 1 go	PRIVATE	NO
		4 5 go	PUBLIC	YES
		5 3 go	PRIVATE	YES

5.3. Account visibility

By default, workspace accounts are created in silos, such that Users are not visible to each other and Contacts are only visible to their creator.

However, it can be necessary to make workspace accounts visible to each other in the following situations:

- you would prefer to allow workspace colleagues to interact and work together in the Oodrive Work_share and Oodrive Work applications.
- you have deployed the Oodrive Save or Oodrive Media application, in which case accounts must be visible to allow user management in the Backup Management and Administration Oodrive Media modules.
- you have deployed the Oodrive Meet application, in which case Users must be visible to each other in order to add guests to their meetings.

Once you activate the account visibility option, this option will display in the user form when creating a new account. The provisioning manager will then be able to make each account visible or not.

1. Click on the **Settings** section.
2. In the **Restrictions** section, check the option **Allow users to be visible to each other**. By selecting this option, you are adding an additional option to the account form.
3. You will then be able to set a value by default for this option, either **Public** or **Private**.
 - If you have deployed the Oodrive Save or Oodrive Media application, select **Public** as the default value
4. The **Visible to other users** option will be pre-selected or not by default on the user form when creating a new account. The creator of the user can then either keep the default value or modify it.
5. Click **Save** along the bottom of the page.

5.4. Block contact management

By default, collaborators can manage contacts from the address book: they can create, modify and delete contacts.

However, if you prefer to centralize and secure contact management in your workspace, you can choose to prevent contact management by users without administrative rights to user management.

1. Click on the **Settings** section.
2. In the **Restrictions** section, check the **Lock contact management from the address book** option.
3. Click **Save** along the bottom of the page.

Once the contact management option is enabled, collaborators who do not have access to the **Users** module will no longer be able to:

- manage contacts in their address book.
- to create contacts on the fly when performing unauthenticated shares or sending documents for signature.

5.5. Notification sender email address

When your workspace colleagues receive an automatic notification, the default sender address is the following: notifications@oodrive.com

You can change the notification sender address at any time:

1. In the navigation panel on the left side of the page, click on the **Settings** section.
2. In the **Notifications** section, change the forwarding address specified in the field.
3. Click **Save** along the bottom of the page.

The sender address will appear on all notifications sent to workspace users.

5.6. Email domain name filtering

In order to ensure better secure and protect your workspace, you have the option to allow only users with trusted domain names or conversely, block users with particular domain names.

Enable email address domain filtering

1. In the navigation panel on the left side of the page, click on the **Settings** section.
2. In the **Email addresses** section, check **Enable filtering of domains based on email addresses**.
3. Select how you would like to filter the domain names:
 - **by authorizing** (filtering by inclusion) or
 - **by prohibiting** (filtering by exclusion)

Please note: you cannot filter via inclusion and exclusion at the same time.

4. Enter an email address domain name in the field provided (e.g., google.com, Hotmail.com, etc.), then click **Add**. Repeat the process to add others.


Filter via inclusion


Email addresses


☒ Enable filtering of email address domains

☒ Only authorize the creation and modification of users with email addresses containing the following domain names

☐ Do not authorize the creation or modification of users with email addresses containing the following domain names

gmail.com 

hotmail.com 

msn.com 


Filter via exclusion


Email addresses


☒ Enable filtering of email address domains

☐ Only authorize the creation and modification of users with email addresses containing the following domain names

☒ Do not authorize the creation or modification of users with email addresses containing the following domain names

gmail.com 

hotmail.com 


msn.com 

5. Click **Save** along the bottom of the page.

Message received when creating a new user, after entering an email address with a prohibited domain name:

New user

Avatar



Edit

Last name *

First name *

Email *

The domain is not allowed

Disable email address domain filtering

1. In the navigation panel on the left side of the page, click on the **Settings** section.
2. Uncheck the option **Enable filtering of domains based on email addresses**.
3. Click **Save** along the bottom of the page.

Your filters will remain available the next time you enable this option.

Remove a domain filter

1. In the navigation panel on the left side of the page, click on the **Settings** section.
2. Then, click on the recycle bin to the right of the domain name that you want to remove.
3. Click **Save** to perform the change.

5.7. Storage

This section does not apply to workspaces with only Oodrive Media or Oodrive Sign Users.

Several options allow you to configure the storage settings applied to Users and Teamspace on your workspace:

- **Advanced setting: minimum storage** allows you to set a minimum storage value required when creating a User or teamspace.
- **Default user storage** allows you to assign a default storage value to new Users.
- **Default teamspace storage** allows you to assign a default storage value to new teamspace.
- **Maximum storage for a teamspace that can be configured by an owner** allows you to set the maximum amount of storage space an owner can allocate to their teamspace.

To add licenses or additional storage space to your workspace, please contact your sales representative.

Advanced setting: minimum storage

This section is dedicated to administrators of Oodrive Work_share, Oodrive Work, Oodrive Meet or BoardNox.

Set a minimum storage value to ensure that all of your Users have the basic storage space necessary to import and share files on your workspace.

For the Oodrive Work solution, this value refers to the minimum storage allocated to the **My space** and teamspace sections.

1. In the navigation panel, click on the **Settings** section and go to **Storage**.
2. In the **Advanced setting: minimum storage** field, enter a minimum value, then click on the drop-down menu to select the size unit:
 - Megabyte (MB)
 - Gigabyte (GB)
 - Terabyte (TB)
3. Click **Save** to perform the change.

Default user storage

This section is dedicated to administrators of Oodrive Work_share, Oodrive Work, Oodrive Meet or BoardNox.

Set a default storage value for new users. This will give them the basic storage space to collaborate on in your workspace. This value can be modified by an administrator in the creation form.

For the Oodrive Work solution, this value refers to the default storage allocated to the **My space** sections.

1. In the navigation panel, click on the **Settings** section and go to **Storage**.
2. In the **Default user storage** field, enter a default value, then click on the drop-down menu to select the size unit:
 - Megabyte (MB)
 - Gigabyte (GB)
 - Terabyte (TB)
3. Click **Save** to perform the change.

Note: The value set in this field must be greater than or equal to that of **Advanced setting: minimum storage**.

Default teamspace storage

This section is dedicated to administrators of Oodrive Work.

Set a default storage value for new teamspace to ensure that teamspace members have the storage they need to collaborate.

1. In the navigation panel, click on the **Settings** section and go to **Storage**.
2. In the **Default teamspace storage** field, enter a default value, then click on the drop-down menu to select the size unit:
 - Megabyte (MB)
 - Gigabyte (GB)
 - Terabyte (TB)
3. Click **Save** to perform the change.

Note: The value set in this field must be greater than or equal to that of **Advanced setting: minimum storage**.

Maximum storage for a teamspace that can be configured by an owner

This section is dedicated to administrators of Oodrive Work.

Teamspace owners can adjust the storage space allocated to their space within the limits you set.

Set a maximum storage value that can be configured by an owner.

1. In the navigation panel, click on the **Settings** section and go to **Storage**.
2. In the **Maximum storage for a teamspace that can be configured by an owner** field, enter a maximum value, then click on the drop-down menu to select the size unit:
 - Megabyte (MB)
 - Gigabyte (GB)
 - Terabyte (TB)
3. Click **Save** to perform the change.

Note: The value set in this field must be greater than or equal to that of **Default user storage**.

Backup storage

This section is dedicated to administrators of Oodrive Save.

Set a minimum storage value to ensure that all of your Users have the basic storage space necessary to save files through their Oodrive Save client.

1. In the navigation panel, click on the **Settings** section and go to **Storage assigned by default when creating users**.
2. In the **Backup storage** field, enter a minimum value, then click on the drop-down menu to select the size unit:

- Megabyte (MB)
- Gigabyte (GB)
- Terabyte (TB)

Note: In order to use the Oodrive Save, a User account needs a minimum of 1 Gigabyte of storage space. As a result, you are required to enter a minimum storage value greater than or equal to 1 Gigabyte.

3. Click **Save** to perform the change.

5.8. Default email language

You can set the default language of emails and notifications sent to workspace users. If no user language is specified when the account is created, the default language will apply.

1. In the navigation panel, click on the **Settings** section.
2. In the **Default email language** section, use the drop-down list to select your users' default language.
3. Click **Save** to perform the change.

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