User Profile Visibility - Appian 7.7 12/8/2014

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# **User Profile Visibility**

Appian 7.7

User Profile Visibility is a concept in Appian that allows a user to view and interact with another user in Appian.

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If a user is "visible" to another user, their profile and contact information is displayed throughout the Tempo, Portal, and Designer interfaces.

A user can be set as not *visible* to other users so that the user's contact information does not display on user interfaces, the user does not show up i searches and generic user lists, and other users can not take action on the user. The specific impact on the interfaces, search, and user interaction ar detailed in the sections below.

**NOTE:** Just as it applies to other securable objects (for example, documents), it is still possible for Process Designers to output the details of any use storing the information as a Text variable and presenting it on a form or page, regardless of the user's visibility.

### Impact on User Interfaces

If a user is not visible to other users, it affects the following aspects of the user's information in the Appian interfaces.

**User Lists** 

If a user is not visible, the user will not show up in generic user lists, such as the Users record list in Tempo or the initial list displayed when accessing the People tab. He or she will, however, still display in the membership list of any groups the user is a part of. In this case, only the user's username display

### **Display Names**

If a user is not visible, anywhere a user's display name would appear is replaced with their username.

Keep this in mind when creating Usernames for new user accounts. If you plan on creating an application that restricts the visibility of users, make sur create usernames that are not personally identifiable. If you already created a username, you can use the updateUsername() and commitUpdateUsername() APIs as part of the Rename Users Plug-in to modify an existing username.

#### User Cards

If a user is not visible, only the username and profile image displays on user cards.

User cards appear when you click on a username within the Portal Interface and when you hover your mouse over a username within the Tempo Interface.

See also: User Cards

#### **User Records**

If a user is not visible, his User record will not be accessible.

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## **Impact on Notifications**

Display names of users are used in Tempo email notifications regardless of a user's visibility in Appian.

In order to ensure usernames are used instead, the TEMPO\_NOTIF\_DISPLAYNAMES setting must be changed.

See below: Setting the Default Settings

## Impact on Search

If a user is not visible, the user does not show up in any search results, including the People Picker. As discussed earlier, the user can still be found through group membership lists, but only the username appears.

## Impact on User Interaction

If a user is not visible, other users can only remove the user from a group or Favorites list.

All other actions are restricted. This includes sending a message, creating a social task, and giving kudos on Tempo.

# Configuring User Profile Visibility

Two factors determine whether a user is *visible* visible within an interface:

- DEFAULT\_VISIBILITY Property Value: Determines the default visibility of all users within the system.
- User's Role Map: Determines the specific visibility of a user to a set of other users.

One factor determines whether a user's display name is visible in email notifications:

• TEMPO\_NOTIF\_DISPLAYNAMES Property Value: Determines whether display names or usernames are used in Tempo email notifications.

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NOTE: Regardless of the property values and user role map settings, users will always be visible to their self and System Administrators.

#### Setting the Default Settings

### **DEFAULT\_VISIBILITY**

The DEFAULT\_VISIBILITY property is a system configuration in the custom.properties file typically set during Post-Install Configurations by the Web Administrator. This property determines the default visibility of all users in the system.

Options include viewer-details and none.

- Viewer-details default value; preserves the previous behavior of all users being visible to other users by default unless you overwrite the role map.
- None makes all users not visible to other users unless rights are added to the user's role map.

#### TEMPO\_NOTIF\_DISPLAYNAMES

The TEMPO\_NOTIF\_DISPLAYNAMES property is also a system configuration in the custom.properties file typically set during Post-Install Configurations be the Web Administrator. This property determines whether display names or usernames are displayed in Tempo email notifications.

Options include true and false.

- true default value; preserves the behavior that display names are used in Tempo email notifications.
- false ensures that only usernames are displayed in Tempo email notifications.

See also: Manage User Profile Visibility

### Modifying a User's Role Map

While the DEFAULT\_VISIBILITY property determines the system-wide setting for visibility and the TEMPO\_NOTIF\_DISPLAYNAMES property determines the system-wide setting for visibility in Tempo email notifications, you can also set the user's visibility at the user-level through their role map. The role map c each user works similar to role maps of other Appian objects and is set by the Modify User Security Smart Service. Only users or groups entered in the Administrator, Editor, and Viewer inputs of the smart service can see the target user in the application.

Each time you implement the Modify User Security Smart Service you write a new role map for the user. Keep this in mind when working with the smart service and make sure to enter every user or group you want as part of the role map each time you implement it.

See also: Modify User Security Smart Service for more information.

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