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Managing User Accounts and User Groups

Contents

Managing User Accounts and User Groups

If you're a system admin, user admin, or group admin, you can use the admin console to add, remove, and edit accounts for users and groups.

Note that this guide does *not* describe how to set permissions for users and groups. You can set permissions if you're a system or space admin, but not a user or group admin. For more on setting permissions, see Managing Administrative Permissions.

About User Accounts and User Groups

User accounts represent people who have access to the application. User groups collect user accounts in order to make it easier to manage access to the application's features.

User Accounts and User Groups

A **user account** represents a person using the application. Each user account has associated content, including the person's profile. For all users, you can use the console to change their user name and password, view and delete the content they've created, and view and edit their profile information. You can also disable a user, such as when they're no longer involved, but you want to hang on to their content.

For more, see Managing User Accounts.

A **user group** collects user accounts, typically in order to make it easier to grant all of the collected users certain permissions. For example, you might create a group of human resources workers so that you can give them (and only them) permission to view potentially sensitive information about employees in a "Benefits" space. A user group is made up of members, who typically aren't aware they're in the group, and admins, who have admin console access through which they can manage user group settings and membership.

For more, see Managing User Groups.

External User Identity Systems

The work you do with user accounts and user groups will depend heavily on whether the application is connected to an external user identity management system. Generally speaking, when you add user accounts and user groups using the admin console, you're adding that data to the same database used to store content. This isn't typically the case if the application is connected to an external user identity system such as **LDAP or Active Directory**. In that case, much of the information about users will be coming from -- and managed within -- the external system.

By default, even if your community uses an LDAP or Active Directory database (or some custom solution), the users you add through the admin console will be added to the application's database and not the external system. It is also possible that user accounts will be managed by the external system, but the groups they're members of will be created and managed locally in the application database. How user group are managed is defined when the external system is connected to the application.

For information on connecting an external LDAP or Active Directory system, see the LDAP and Active Directory Guide.

User Registration

You can configure the application so that users can register on their own. When you enable user-created accounts, people can register by entering basic required registration information (such as a username and password), along with user profile information. They can also invite other people to join the community.

For information on configuring registration, see the Configuring User Registration.

Managing User Groups

A user group collects user accounts to make managing permissions easier. For example, you might create a user group called "hr_users" and add user accounts for people in the human resources department. The existence of user groups isn't visible in the application's user interface.

User groups are made up of members and admins. Unless they have access to the admin console, members typically aren't aware that they're in a user group. The account simply defines (at least partly) their access to the application's features. Group admins have access to the area of the admin console through which they can manage settings and membership for a group they're administering. By default, they get to this feature by directing their browser to a URL as described in Starting the Admin Console. Unless they have other types of admin access, they'll only be able to access account management pages for the account they're administering.

Be sure to see Managing User Accounts and User Groups for overview information on how accounts work.

Note that if your community uses an external database (such as LDAP or Active Directory) to manage user identities, you won't by default be able to use the admin console to edit information managed there. Also, it's possible for your community to use an external data store for user account information, but not for user groups (which you can instead create and manage with the admin console). For more information about using LDAP or Active Directory with Jive, take a look at the) LDAP and Active Directory Guide.

Fastpath: Admin Console: People > Management > Group Summary

Fastpath: Admin Console: People > Management > Create Group

Adding User Groups

You add user groups by creating and naming a group, then adding user accounts for each of the group's members. You also add one or more user accounts for those who'll be administrators for the account.

1. In the admin console, go the Create Group page at People > Management > Create Group.

2. Enter a group name. Choose something that will help you know at a glance what the group is for and who's in it. Add a description if you like. Create **Create Group**.
3. Use the Add Members links to add user accounts for people who should be members of the new group. For more information see Managing Group Membership.
4. Use the Add Admins links to add user accounts for people who will have permission to administer the account. For more information see Managing Group Membership.

Fastpath: Admin Console: People > Management > Create Group

Try defining user groups before launching the community. For example, you can group users according to employee job function or department. User and Group permissions can be assigned on a space or sub-space basis.

Note: If your user account and user group information is stored externally (such as in LDAP or Active Directory), new user groups you create will be managed in the admin console and stored in the local application database instead.

Tip: You can create user groups for testing, then add user accounts to the groups later.

Managing Group Membership

When you're adding or editing the membership list of a user group, you use the Group Members page. You can reach this page while you're creating the group by clicking the Add Members or Add Admins link on the Group Settings page. For a group that's been created already, go to the Group Summary page, then click the group's name in the list to get to its settings page. On the settings page, click the appropriate Edit link to edit membership.

Add members to the group by typing their name in the Add Member box, then clicking the Add button. If you don't know the name, click User Picker to browse or search a list of users, then select the check box for the user you want to add. Unless they have access to the admin console, users won't know which user groups they're a part of.

Add administrators in the same way you add members. User group administrators have access to the portions of the admin console where they can manage settings and membership for the group they're administering.

Fastpath: Admin Console: People > Management > Group Summary

Editing Group Settings and Properties

Group settings are simple, including the group's name and description, along with group properties. You can edit a group's settings in the admin console by going to the Group Summary page, then clicking the group's name.

Group properties are simple name-value pairs that programmers can use to work with the group in their code. Group properties are often used as a way to keep track of extra information about the group. For example, if groups are defined based on company departments, each could have a departmentID property whose value is the department's internal billing ID. A group can have multiple properties. When you're working with properties, remember that entering the name and value for an existing property will update that property's value to the one you entered.

Managing User Accounts

A user account represents a person using the application. Everything about a person's activity in the application is associated with their user account. From a person's user account page in the admin console, you can view their profile information, their activity (such as content they've posted), change their password, and delete their account.

Be sure to see Managing User Accounts and User Groups for overview information on how accounts work.

Note that if your community uses an external user identity system (such as LDAP or Active Directory) to manage user data, you won't by default be able to use the admin console to edit information managed there. Console fields corresponding to data in the external system will be disabled, and you won't be able to delete users from the admin console. (Typically, the external system stores profile information about the user, while information about their activity in the application is stored in the application database.)

For more information about using LDAP or Active Directory with Jive, take a look at the) LDAP and Active Directory Guide.

Fastpath: Admin Console: People > Management > User Search

Fastpath: Admin Console: People > Management > Create User

Managing User Account Information

Each user account has a page in the admin console where you can get information and perform actions on the account. To get to this page, in the admin console go to the user Search page, then browse or search for the user's account. Click the user's name to view their user summary page.

Fastpath: Admin Console: People > Management > User Search

Profile Information

Among the user properties you'll see information that's part of the user's profile. Much of this is the same information that the rest of the community sees when they view the user's profile in the end user UI.

Password

You can change the password for a user account. Note that an administrator can configure the application to enable people to request their own password reset. If that feature is disabled, then you can reset the password from the User Summary page.

Note: The application doesn't send an email to the person whose password you changed when it's changed this way.

Enabled

You can disable a user account, removing their access but keep their content in the system. For more information, see Deleting and Disabling User Accounts.

User Activity in the Community

You can view lists of the documents, discussion messages, and blog posts that a person has contributed or worked on. The User Properties lists will display quantities for each, and you can view a list of the items themselves by clicking the name of the kind of item you want to view.

Visiblity Settings

You can choose whether or not a person's name and email address are visible to others in the community.

An administrator can configure the application so that a person can set the visibility of their own name and email address. If that's the case, then the user will be able to change the setting independently of the setting you make in the admin console. In other words, if you change it, they can change it back.

Group Membership

If the user account is a member of user groups, links to those accounts will be displayed among the user properties.

User groups are a way to collect user accounts to more easily manage user access and permissions. For more information about them, see Managing Group Accounts

Email Notifications

The User Properties list displays the number of email notifications the person is signed up for. To see a list of the notifications, click the number.

For an introduction to email notifications, see What are email notifications?

Avatars

If a person has uploaded their own avatars, their User Summary page will display the images they've uploaded. You can delete avatar images from this page.

For more on managing avatars, see Avatar Settings

User Properties

User properties are simple name-value pairs that programmers can use to work with the user account in their code. User properties are often used as a way to keep track of extra information about the user account. A user can have multiple properties. When you're working with properties, remember that entering the name and value for an existing property will update that property's value to the one you entered.

Adding User Accounts

When you need to create user accounts, you do so on the admin console's Create User page. By default, if your community uses LDAP or Active Directory to manage users, new user accounts you create from the admin console will go into the local application database (where content is stored). You will be able to edit user account properties for LDAP-managed users if your LDAP provider allows it (by default, it isn't allowed).

Fastpath: Admin Console: People > Management > Create User

1. On the Create User page, enter basic information, including user name, "friendly" name, email address, and password. You can also request to send the new user a welcome email. (For more on the template a welcome email is created from, see Managing Email Templates.)

   Note: A user name may not contain any of the following characters: **, / ? & #**

2. Click a button to continue. In general, you should edit properties for the user account while you're creating it. That's because the new account doesn't yet have permission to do anything in the community.

   - To create this new account and edit its properties now, click the Create User button. For more about the account properties you can edit, see Managing User Account Information.
   - To create this account and move on to creating another (without editing account properties), click the Create & Create Another User button.

Deleting and Disabling User Accounts

You can disable or delete a user account when you want to remove the person's presence from the community. You can disable or delete from either the User Search page, where user accounts are listed, or from the account's user summary page.

Note: An administrator can also ban someone if you merely want to prevent their having access to the community. For more information about banning, see Banning People.

- Disabling a user account removes their access but keeps their content in the system. When you disable someone's account, Jive will replace their former avatar with a blank avatar; the word "Disabled" will appear on their profile. The person will no longer be able to log in or receive notifications, but their content will remain viewable in the application.
- Deleting a person's user account also deletes the content they've contributed. This is a permanent action that, depending on the user's amount of activity, can have an impact on content throughout the community. If you're not sure whether you want to delete the account, consider banning or disabling the user instead.

When you delete a user account, you begin the deletion by clicking the link. However, the actual deletion might take a few minutes to finish, depending on how much content is associated with the account.

Caution: Deleting someone's account is permanent. You'll be deleting everything about the user's presence in the system. This includes in some cases content that was created by other people (such as replies to the deleted user's posts). Be sure to read the warnings on the Delete User page!

Moderating User Registration

If you've set up the application to allow people to register on their own, you can moderate those new registrations. (A system administrator enables both user registration and moderation for new registration requests.)

Fastpath: End User UI: Your Stuff > Items Awaiting Approval (admin profile's Pending Approvals tab)

When someone registers (usually by filling out the registration form defined by the system administrator), you'll get a chance to approve or decline their request. In the end user UI, click Your Stuff > Items Awaiting Approval. On the Pending Approvals tab of your profile, view the list of requests. You can click the person's name to view a profile page with the information they entered. Click Approve or Decline for each request. If you decline, you can enter your reason before finishing.

Synchronizing with User Authentication Systems

You can set up the application to synchronize data between its database and your external user identity system such as LDAP or Active Directory. This feature helps you ensure that the local application database contains only data related to users who are in your external user identity provider. Configure this feature in the admin console.

After you enter values to configure the feature, you can click the **Run Synchronization Task Now** button to go ahead and synchronize.

Fastpath: Admin Console: People > Settings > User Data Synchronization Settings

Setting	Description
Scheduled sync task enabled?	Synchronize with the user identity system nightly.
Synchronize user relationships?	Include user relationships in the data that's synchronized. For more on relationships, see Configuring User Relationships.
Managing LDAP attribute name	Visible when **Synchronize user relationships** is selected. The name of the LDAP attribute that provides information about user relationships.

Setting	Description
Synchronize profile photo?	Include profile photos among the data that's synchronized. For more about profiles, see Defining User Profile Templates. You might want to let people maintain their profile photos independently.
User photo LDAP attribute name	Visible when **User photo LDAP attribute name** is selected. The name of the LDAP attribute specifying the user photo.
Last modified LDAP attribute name	The LDAP attribute on a user record which typically holds a timestamp of when the user's record was last modified. A common attribute name is "whenChanged".
Synchronize user profiles on login?	Synchronize a user's profile information when the log in.
Disable non-administrative user accounts not found in source during synchronization?	Disable an account in Jive when the account is not fount in the user identity system. This is useful to help ensure that the enabled accounts in Jive are only those that are also in your system of record.
Disabled user LDAP attribute name	Visible when **Disable non-administrative user accounts...** is selected. The name of the LDAP attribute that indicates whether a user account is disabled.
Disabled user LDAP attribute value (regular expressions allowed)	Visible when **Disable non-administrative user accounts...** is selected. The value of the "disabled" attribute when it indicates that the user account is disabled.

Defining User Relationships

You can define relationships between people. The relationships you define are optionally visible in people's profiles. Using these relationships, people can stay on top of what certain people in the community are doing, including their changes to content, status messages, and so on.

Fastpath: Admin Console: People > Management > User Relationships

Although they're simple to use, user relationships require a little thought to manage well. Be sure to read the overview on user relationships, How User Relationships Work.

On the admin console's User Relationship Management page, you can view existing relationships and create or retire (break) relationships. Here, a "relationship graph" is the kind of relationship you're creating or retiring.

Viewing and Breaking Relationships

The page lists existing relationships. You can browse and filter the list to locate the one you want to break.

1. In the admin console, go to the User Relationship Management page.
2. View the list of relationships at the bottom of the page. You can filter the list to display only the relationships that include a particular person. To do so, enter that person's username in the Filter by Username box, then click the Filter button.
3. To break a relationship, locate the relationship you want to break, then click its Retire button.

Creating Relationships

The relationship graph dropdown will list the kinds of relationships your community supports.

1. In the admin console, go to the User Relationship Management page.
2. Click the Relationship Graph dropdown and select the kind of relationship you want to add.
3. Enter the usernames of the people in the new relationship. If you can't remember the username, click User Picker to browse and search a list of users, selecting the check box next to the one you want.
4. Click the Add button to create the relationship.

Note: If your community draws data about people from an external data source such as LDAP or Active Directory server, then organizational relationships might already be defined.

How User Relationships Work

A user relationship connects two people in the community, allowing them to see one another's community activity. For example, a person who has "friended" another person can use widgets on their personalized home page to view a list of that person's recent posts, see their status messages, and so on. They can also use a tab on their profile to view their friends' community activity, send them email, and so on.

People can be part of two kinds of relationships, as described below. An administrator can enable one or both kinds of relationships. An administrator can also enable whether people using the community are able to create their own relationships, as well as whether approval should be required from the second person when the first requests a relationship.

- **Organizational chart** relationships, such as a relationship in which one person reports to another. Depending on how relationships are configured, it can be possible for people in the community to create their own relationships in either direction -- as reporting or reported to.

  Depending on how your community is configured, organizational relationships might be defined in an external user identity system such as LDAP or Active Directory, and merely displayed in the application. If so, these relationships typically can't be edited in the admin console or by people using the community.
- **Friend** or **connection** relationships, where two people are connected outside a hierarchical context. Your community will support *either* friend or connection relationships depending on whether user relationships have been configured to be bidirectional (friends) or unidirectional (connections). An administrator configures this type of relationship to be one or the other.

  In addition to determining how you manage such relationships in the admin console, the directionality setting determines the labels and commands people see in the application's end user interface. For example, one person can "friend" another to create a bidirectional friend relationship in which they're friends of one another. In contrast, a person can "follow" another to create a unidirectional connection relationship in which the followed person's activity is seen by the first person, but the followed person needn't reciprocate.

Direction	Description	Example
Unidirectional	A unidirectional relationship is one in which one person declares a relationship with another person, but the other person isn't invited to reciprocate (although they can separately create a similar relationship with the first person). Unidirectional relationships might be suited to situations where a reciprocal (bidirectional) relationship would be inappropriate or burdensome for the second person.	Someone working in a particular area is interested in keeping up with the work of another person who is doing research in that area. The first person clicks a link to "follow" the researcher. The researcher has no particular interest in following the person following them, so they needn't be prompted to follow the first person. If approval is required, the researcher receives the request and decides whether to approve it and let the first person follow them; otherwise, the unidirectional relationship is created automatically.
Bidirectional	In a bidirectional relationship, one person's relationship declaration creates (or at least invites) a relationship that goes the other way. Bidirectional relationships might be useful for communities in which people's personal relationships are less hierarchical, or are less specialized.	Someone with a particular interest notices that another person has similar or complementary interests. The first person clicks a link to "add as a friend" the second person. If approval is required, the second person receives the request and decides whether to approve it and become a friend of the first person; otherwise, the bidirectional relationship is created automatically.

Configuring User Appearance Options and Presence

Letting Users Control Their Own Settings

You can let people control how their profile information is displayed in the community, as well as provide them with other customizations, or you can set this information for them. For example, you can set whether they can change the visibility of their name and email address, or you can just select the group who sees their name and email address. You can also enable or disable personalized homepages and profile images. For information on customizing the user's profile, see Defining User Profile Templates.

Fastpath: Admin Console: People > Settings > Profile and Homepage

Setting	Description
Allow Profile Images	Set to "Yes" to allow people to display an image (such as of themselves) on their user profile.
Show Full Name by Default	Set to "Yes" to have a person's full name displayed on their profile, as opposed to merely their username. In some communities, such as some that are visible to the public, people would prefer not to have their full name displayed. Each user can override this default for themselves.
Allow Personalized Homepage	Set to "Yes" so people can personalize their home page using widgets. Widgets are designed to provide a custom view of content (and not necessarily content). If for some reason you want to disable the ability for people to make personalized homepages, you can do so on the Profile and Homepage page.
Name Visibility	Select **Users may edit the visibility for their name** to let users set whether their name should be visible to others in the community. You can also set who sees the name by default.
Email Visibility	Select **Users may edit the visibility for their email address** to let people set whether their email address should be visible to others in the community. You can also set who sees the email by default.
Profile Image Visibility	Select **Users may edit the visibility for their profile image(s)** to let users set who can view their profile image. You can also set who sees the profile image by default.
Creation Date Visibility	Select **Users may edit the visibility for their creation date** to let users set who can view their profile creation date. You can also set who sees the creation date by default.
Last Login Date Visibility	Select **Users may edit the visibility for their last login date** to let users set who can view their last login date. You can also set who sees the last login date by default.

Defining User Profile Templates

User profiles are like other content in that they can be found on searches. Because of this, information that people give about themselves — including interests and areas of expertise — can be a great source of information for people looking to have a question answered. A person's profile can include biographical and professional information, along with links to content they've contributed.

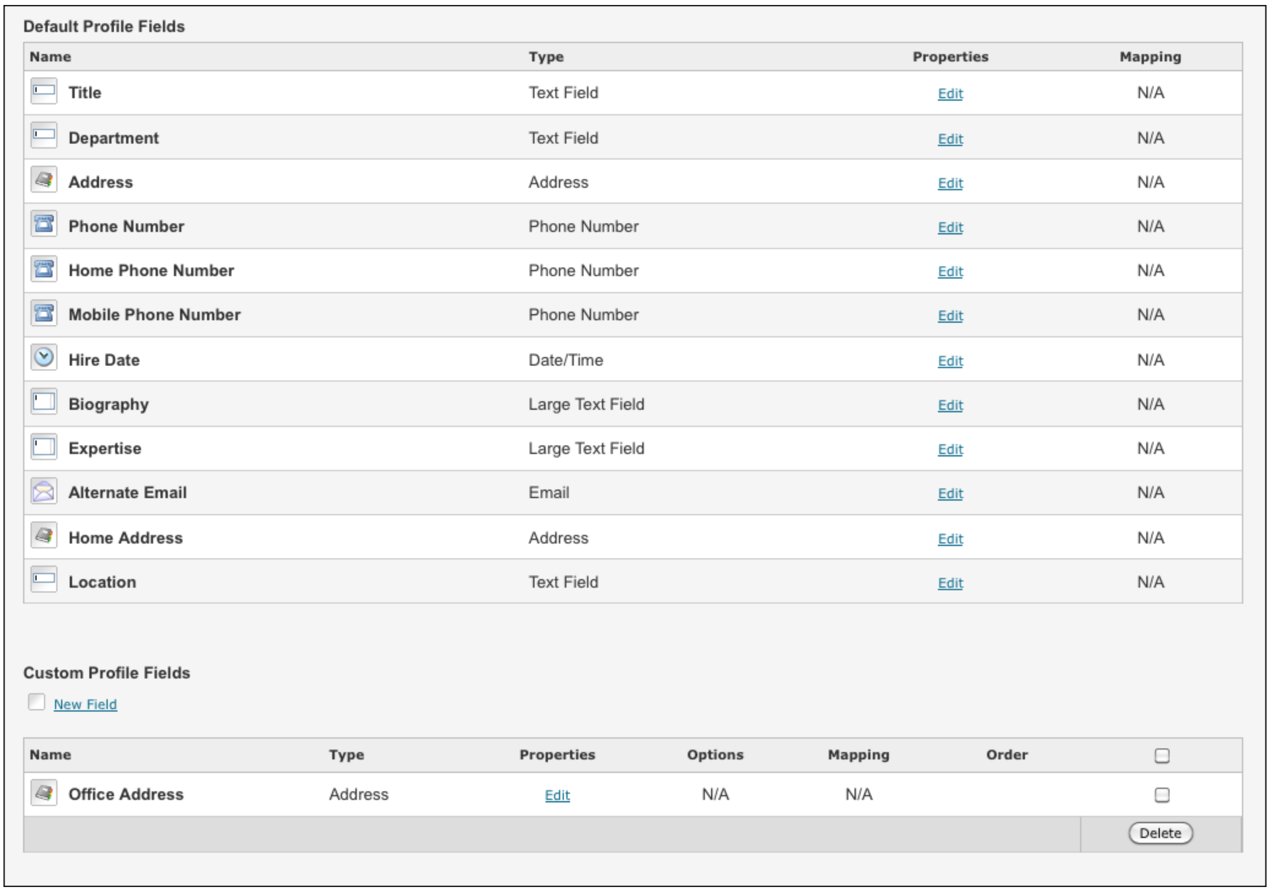
Fastpath: Admin Console: People > Settings > Profile and Homepage

The Settings section enables you to fine-tune certain profile settings, including who can see essential fields by default. You can also set whether to show the user's full name, or allow profile images or personalized home pages. For more information on configuring these settings, see Letting Users Control Their Own Settings.

Changing Profile Fields

You can define the exact profile template you want to provide users so they can complete their profile. The application includes several commonly used fields by default, and you can add customized fields as well. keep in mind that if you allow people to register themselves, you can define a form with a subset of these customized fields for a person to complete when they register.

To edit an existing field, click **Edit**. See the Editing Fields section for information on how to edit a field's properties. To create a custom field, click **New Field**. See the Customizing Fields section for information on adding new profile fields.



Default Profile Fields

Name	Type	Properties	Mapping
Title	Text Field	Edit	N/A
Department	Text Field	Edit	N/A
Address	Address	Edit	N/A
Phone Number	Phone Number	Edit	N/A
Home Phone Number	Phone Number	Edit	N/A
Mobile Phone Number	Phone Number	Edit	N/A
Hire Date	Date/Time	Edit	N/A
Biography	Large Text Field	Edit	N/A
Expertise	Large Text Field	Edit	N/A
Alternate Email	Email	Edit	N/A
Home Address	Address	Edit	N/A
Location	Text Field	Edit	N/A

Custom Profile Fields

New Field

Name	Type	Properties	Options	Mapping	Order	
Office Address	Address	Edit	N/A	N/A		
						Delete

Editing Fields

Click a field's Edit link to edit the field's properties. When you edit a profile field, you're defining its behavior in the system -- who can see it, whether it's editable, and so on.

Be sure to consider whether or how a field should be visible. For example, in some communities people might not want their phone number widely visible.

Note: Only visible fields are available when searching or browsing.

Give some thought to how people will be using profiles -- to introduce themselves or to find other people, for example -- then select or clear attributes accordingly. For example, making too many fields required could have the effect of discouraging people from completing them. The following list describes the attributes you can assign the profile field.

- Required -- People won't be able to save a profile when they leave a required field empty.
- Filterable -- When a field is filterable, people can type or select values of the field to make a list of people shorter. For example, someone viewing a long list of people in the community could make the list shorter by filtering on the hire date, specifying that the date be no earlier than last year.
- Searchable -- A searchable field is seen by the search engine.
- Editable -- People can edit their editable profile fields.
- Externally managed -- An externally managed field is associated with an external user directory, such as LDAP. Select this to include this field among those that can be synchronized with the external system. You'll need to separately set up synchronization. For more information, see Synchronizing with User Authentication Systems.

Customizing Fields

The Custom Profile Fields section is where you can create customized fields for user profiles. When you add two or more custom fields, you can adjust the order by clicking the up or down arrows in the Order column.

1. Click the **New Field** to create a new profile field.
2. Select the field type. You can choose from text, numeric, or many more types to help provide the best user experience for this field's information.
3. Click **Continue**.
4. Enter the field name. This is a label that identifies the field content, and it may be different than what the user sees in their profile.
5. Enter the Language Display Name, and click **Add Translation** for each language you want to provide translations for. This is what the user sees in their profile field.
6. Select the visibility information for this profile field. This determines which level of user can see this field in another user's profile. Set this field considerately because some sensitive information should have limited visibility. You can also set the default and enable user's to edit their own profile field's visibility. For example, some people may be more comfortable publishing their phone number than others.

   Note: Only visible fields are available when searching or browsing.

7. Select one or more of the following attributes for the field:

   - Required -- People won't be able to save a profile when they leave a required field empty.

- Filterable -- When a field is filterable, people can type or select values of the field to make a list of people shorter. For example, someone viewing a long list of people in the community could make the list shorter by filtering on the hire date, specifying that the date be no earlier than last year.
- Searchable -- A searchable field is seen by the search engine.
- Editable -- People can edit their editable profile fields.
- Externally managed -- An externally managed field is associated with an external user directory, such as LDAP. Select this to include this field among those that can be synchronized with the external system. You'll need to separately set up synchronization. For more information, see Synchronizing with User Authentication Systems.

8. Click **Finish**.