Managing Users and Groups

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If you're a system admin, user admin, or group admin, use this brief guide to learn how to 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 Permissions*.

In This Section

- Jive SBS can use its own database, an LDAP or Active Directory database, or a custom solution for getting data about users.
- You can edit user data or add new user accounts using the admin console. You can also create user groups to collect user accounts to make assigning permissions easier.
- By default, if a user's data is stored in LDAP, Active Directory, or a custom solution, you can't edit that user's data.
- You can disable a person's user account if they'll no longer be using the application.
- You can describe the organizational relationships between people so that this information is visible in the user interface.

Understanding User and Group Accounts

Generally speaking, when you add user and group accounts using the admin console, you're adding that data to the same database used to store content. 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 data source. (For information on connecting an external LDAP or Active Directory system, see the LDAP and Active Directory Guide.)

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.

A group account 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.

Adding User and Group Accounts

You can manually add new user and group accounts. When you go to add a user account, you'll enter basic information, including user name, "friendly" name, email address, and password. You'll also specify whether to send the new user a welcome email. (For more on the template a welcome email is create from, see Managing Email Templates.)

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

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).

You might define the user groups you'll need before launching the space. For example, group users according to employee job function or department. User and Group permissions can be assigned on a space or sub-space basis.

In the UI: Admin Console: People > Management > Create User
In the UI: Admin Console: People > Management > Create Group

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.)

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.

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

Connecting to User Authentication Systems

Jive SBS includes a database for storing data about people and groups you add. But you can use another system instead, including LDAP, Active Directory, or a custom system. You choose a user data system when you're setting up the application with its setup tool; you can't specify or configure a system in the admin console.

You'll find a full guide for connecting to a user data system in the LDAP and Active Directory Guide.

You can also set up the application to synchronize data between its database and your external user database. On the **User Data Synchronization Settings** page, you can enable synchronization and set how synchronization is done. This feature helps you ensure that the local application database only contains data related to users who are in your external (LDAP or Active Directory, for example) database. For example, you can disable the account of a person whom your external database shows as no longer enabled.

In the UI: Admin Console: People > Settings > User Data Synchronization Settings

Editing User and Group Accounts

You can edit information included in a user or group account.

For user accounts, you can also list and delete a person's content through the admin console. The User Summary page will list user accounts. You can also use the User Search page to find them (which is helpful if your list of users is very large). Once you've found the user account you want to edit, click the account name to view its properties. You can change profile information, password, even view and delete the person's content.

By default, if your community uses LDAP or Active Directory to manage user and group accounts, you won't be able to edit the account properties that the external database manages. At a minimum, this is the account name and password, but could include others as well. The properties you *can* edit are the ones stored in the local database.

In the UI: Admin Console: People > Management > User Summary > (Click the user account name)

Disabling User Accounts

When you want to remove access for a particular person but keep their content in the system, you can disable their account. When you disable someone's account, Jive SBS will replace their former avatar with a special avatar that features a strikethrough; 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.

In the UI: Admin Console: People > Management > User Summary > (Click the Disable button where the user account is listed

Defining User Relationships

You can define relationships between people in your user database. The relationships you define will be 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.

People can be part of two kinds of relationships:

- **organizational** relationships, such as a reporting relationship at work.
- "**friend**" or "**following**" relationships that they create themselves. The difference between those two depends on user relationships have been configured to be unidirectional or bidirectional:

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.

Depending on your user relationship settings, people can also help to create the relationships using the end user interface. For example, a manager can add other people as direct reports through a link in each of those people's profiles.

Click **Retire** to break the connection between two people.

Note: If your community draws data about people from an external data source such as and LDAP or Active Directory server, then organizational relationships might already be defined.
In the UI: Admin Console: People > Management > User Relationships

Configuring User Appearance Options and Presence

Enabling Personalized Homepages

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.

In the UI: Admin Console: People > Settings > Profile and Homepage

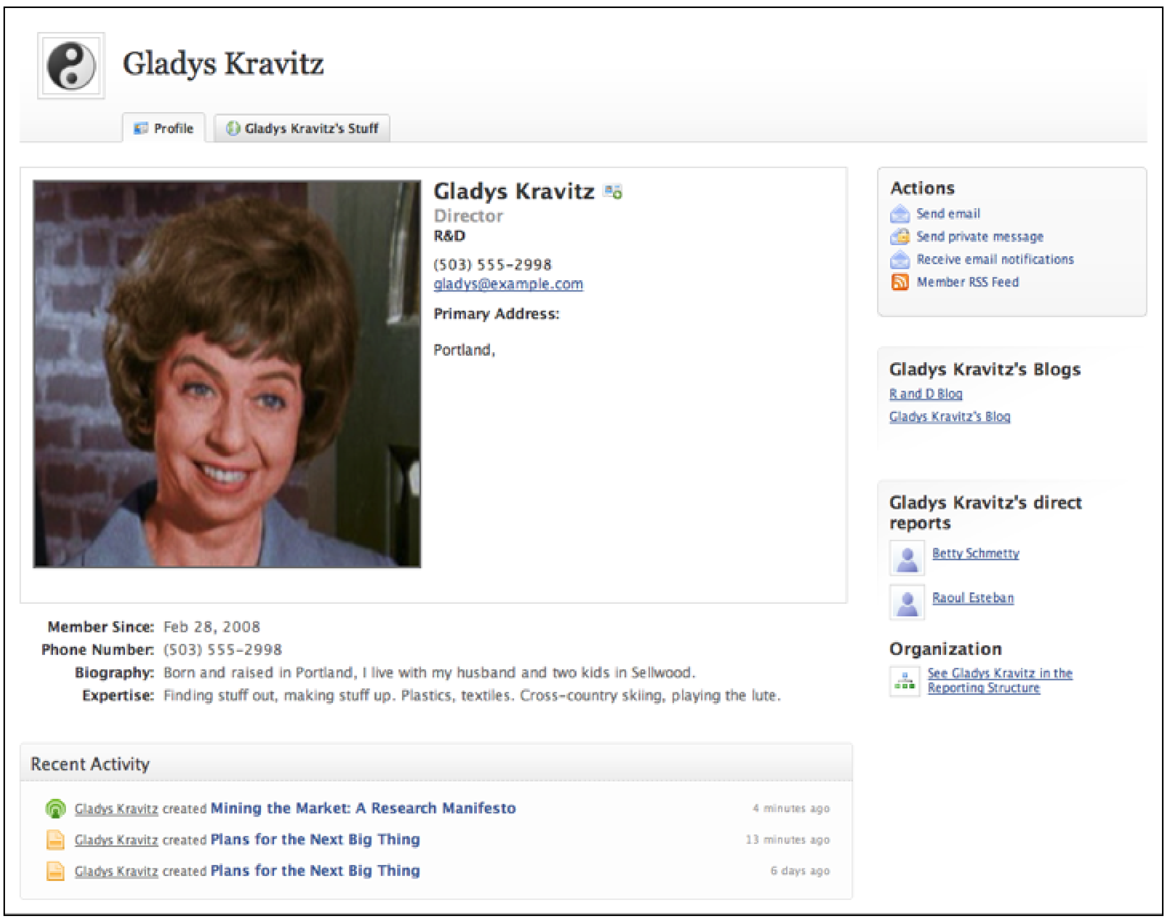
Enabling Status Updates

When you enable status updates, you give people access to the Status Updates widget (for their personalized home pages), through which they can add status messages. A status message is a brief statement such as "Gladys is working on the quarterly results summary" or "Raoul is playing minesweeper."

In the UI: Admin Console: People > Settings > Profile and Homepage

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.



You can customize the profile template, providing the fields that people will fill in with profile information. The application includes several commonly used fields, but you can add your own as well. Also, if you allow people to register themselves, keep in mind that you can defined a form with a subset of these fields for a person to fill out when they register.

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
Pager Number	Phone Number	Edit	N/A
Fax Number	Phone Number	Edit	N/A
URL	URL	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

In the UI: Admin Console: People > Settings > Profile and Homepage