



Jive Interactive Intranet

## Cloud Administrator Guide

User Synch



# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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# Aurea global support

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If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please, try to:

- Search the articles on the [Aurea Knowledge Base](#) for solutions to your issues.
- Search the product documentation and other product-related information that are also available on [Support Central](#).

If you still cannot find a solution, open a ticket on [Aurea Support Central](#). Information about the support organization is available on [Support Portal](#) as well.

You can also find the setup files on [Support Portal](#).

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our [website](#).

# 1

## Basic User Sync add-on overview

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IT admins can create, update, and deactivate user accounts in an external system and Basic User Sync keeps the Jive People directory up to date with the latest information. After you securely upload the CSV file containing user details and profile information, Basic User Sync handles creating and updating all user records. Basic User Sync performs a daily process to securely, easily, and fully synchronize your Jive users each night with the CSV file uploaded to our SFTP server.

Basic User Sync benefits users because their profiles are complete, and the corporate directory is always up to date and reliable. It also reduces administrative overhead and user input errors for community managers, saving them time.

*The Basic User Sync add-on keeps your corporate Human Resource systems in sync with Jive, ensuring a complete and accurate corporate directory for your community.*

For details, see the following topics:

- [System requirements](#)
- [Supported browsers](#)

## System requirements

Here you can find requirements for using Basic User Sync in Jive.

To configure and use the Basic User Sync add-on, you need the following:

- The current version of Jive Cloud.
- Manage Community permissions in your Jive Community.
- An SFTP account from Jive. For more information, see [Creating and uploading CSV file for Basic User Sync](#) on page 10.
- SFTP site and Jive instance network whitelists allowing User Sync servers.

## Supported browsers

Jive works with most current web browsers. Note that if you need to use Content Editor features, such as cut and paste, script access to the clipboard must be enabled.

- Microsoft Edge (Chromium-based).
- Apple Safari\* (on Macs only).
- Mobile Safari on iPhone and iPad for iOS 11 and later. (For a browser-independent native iOS phone app, be sure to look for the Jive Daily: Intranet on the go app, if your community uses it, in the [App Store](#).)
- Mobile Chrome on Android devices for Android 8 and later. (For a browser-independent native Android phone app, be sure to look for the Jive Daily: Intranet on the go app, if your community uses it, in [Google Play](#).)
- Mozilla Firefox\*.
- Google Chrome\*.

\* Google Chrome, Mozilla Firefox, Apple Safari, and Microsoft Edge browsers are released frequently. Jive Software makes every effort to test and support the latest version.

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**Note:** The recommended minimum screen resolution for desktop devices is 1024 x 768. Results may vary if you use zoom to adjust your view to levels other than 100%.

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### Important notes and restrictions:

- Chromebook is not supported.
- Beta versions of web browsers are not supported, but they are quickly added to the supported list after they're formally released.
- Apps are not supported on mobile devices. These features may not work correctly on mobile devices.

# 2

## Setting up and administering Basic User Sync

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1. Check that you have an SFTP account. If you do not have it, submit a support case at [Support](#). For more information, see [Creating and uploading CSV file for Basic User Sync](#) on page 10.
2. A Jive engineer will perform the required initial configuration on your instance. If the initial configuration has not been completed, please submit a support case at [Support](#).
3. Configure the Basic User Sync add-on, as described in [Configuring Basic User Sync add-on](#) on page 9.
4. Upload the source CSV data file, as described in [Creating and uploading CSV file for Basic User Sync](#) on page 10. For more information on filling in the file, see [CSV file fields](#) on page 11.
5. Monitor the error reports, as described in [Monitoring email reports from Basic User Sync add-on](#) on page 12.

Note that there are differences in treatment of federated and nonfederated users. For more information, see [Managing federated users](#) on page 13.

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**Note:** Welcome emails from Jive that are normally sent with the creation of a new user are OFF by default. If you would like to have Jive email users their new password when their user is created, ask your Jive Project Manager or contact [Support](#). Note that this option is not available for federated users.

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*Setting up the Basic User Sync add-on based on your community profile needs.*

For details, see the following topics:

- [Configuring Basic User Sync add-on](#)
- [Creating and uploading CSV file for Basic User Sync](#)
- [CSV file fields](#)
- [Monitoring email reports from Basic User Sync add-on](#)
- [Managing federated users](#)

## Configuring Basic User Sync add-on

The Basic User Sync add-on has a configuration panel where you can set the important sync options for your users.

These settings name and describe the CSV file that you upload for processing, and provides configurable options for the users that are created.

You need at least Manage Community permissions to configure the Basic User Sync add-on.

To configure the Basic User Sync add-on:

1. In the Jive user interface, go to **Your avatar > Add-Ons** .
2. On the **All Add-ons** tab, find the Basic User Sync add-on in the list and click **Gear icon > Settings** next to it.
3. Click **Configure Now**.
4. Configure the options, described in [Basic User Sync add-on properties](#) on page 9, which tell the add-on how to process your CSV files.
5. Click **Save and Activate** to save the settings.

### Basic User Sync add-on properties

Property	Description
<b>Filename</b> (required)	The filename that the Basic User Sync add-on must process from the SFTP server.
<b>User lookup method</b> (required)	The user lookup method is the piece of data used to find and update users in your Jive system. If the user is not found, it is created in Jive. The user lookup method looks at the first column of your CSV file and should be set to a username, email address, or external ID.
<b>Check "Sync is enabled"</b> (required)	The sync must be enabled here for the process to run. If you do not want the process to run, clear this check box.

Property	Description
<b>Federate users</b>	Select this check box if you would like users to be added or updated as federated users. Federated users are users that exist in an external system to Jive, such as Active Directory or LDAP.
<b>CSV column headers present</b>	Check the CSV column headers present if you have the first row of your CSV file set to column names. If there are no column names and only user data, clear this check box.
<b>Set the custom profile fields</b> (in the order they appear in your CSV file)	For details on how to format the data, see <a href="#">Creating and uploading CSV file for Basic User Sync</a> on page 10.
Enter any email addresses that need to be alerted to successes and failures of the sync process on the right-hand side	For more information, see <a href="#">Monitoring email reports from Basic User Sync add-on</a> on page 12.

## Creating and uploading CSV file for Basic User Sync

To get user data and profile information into the Jive Basic User Sync add-on, you need to export the data from the source system into CSV (Comma Separated Values) format.

### CSV file editor apps

Many people use Microsoft Excel to create and edit these files, but any application that can create a CSV file works. You should save the result as CSV format, even though Excel will try by default to save as XLS or XLSX which will not work with the sync. For more information, see Import or export text (.txt or .csv) files on Microsoft portal at <https://support.office.com/en-us/article/Import-or-export-text-txt-or-csv-files-5250ac4c-663c-47ce-937b-339e391393ba>.

### Uploading CSV files

You must upload the CSV file to the Jive SFTP server by using the address and credentials provided to you by [Support](#).

The CSV file should be placed in the `/storage/user_sync/` directory.

For the list of CSV fields and fill-in rules, see [CSV file fields](#) on page 11.

### Processing CSV files

By default, only users that exist within the CSV file are processed. Any user that exists in Jive but not in the CSV file will not be modified. If you would like to deactivate any user that does not exist in your CSV file, submit a support case at [Support](#). The support team will put in a request to have this option changed for you.

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**Attention: Special notes on file data:** If more than **one** record is found for a user, only the first record will be processed. It's important to be sure that your source data is clean, valid CSV, and it is recommended that the duplicates removed before going into Jive.

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## CSV file fields

Here you find the list of CSV fields and fill-in rules fro preparing CSV data files for upload.

### CSV fields

The CSV file should be formatted to include the following fields in the particular order:

- User Details (required):

- • **Primary Key**

It can be Username, Email, or SAML ID.

- **First Name**

- **Last Name**

- **Email Address**

- **Username**

- **Enabled/Disabled** flag

This field cannot be blank. Each row must contain `enabled/disabled, true/false, 1/0` Boolean values.

- **Profile Details** (optional)

Up to 5 profile fields can be synchronized.

For the example files, see [User Sync Add-On Example Files](#) on Worx.

### Requirements for formatting data in fields

<b>Encoding</b>	The files must be UTF-8 encoded.
<b>Primary key</b>	<p>The <b>Primary Key</b> must always be the first field and must contain a username, email, or SAML ID to be used to uniquely identify this user and search for it in Jive.</p> <p>Basic User Sync process takes the primary key of each row (always the first column) to use as its way to look up the correct user in Jive. If the user exists, it is updated with any new information in the file. If the user does not exist, it is created.</p>
<b>Order of fields</b>	The order of the fields is important for the user sync to work correctly.
<b>Dates</b>	Dates must be formatted differently depending upon which field you are mapping to. Any Jive default date fields will be in

UTC+offset standard format. For example, a date in Jive can look like this: 1997-07-16T19:20+01:00.

Any profile field that you custom created must be in standard MM/DD/YYYY format.

Jive default profile dates, such as `Member Since` and `Last Logged In`, are set by Jive, and cannot be synced.

**Enabled/Disabled Flag** The **Enabled/Disabled** field is required, and each row must have a value. This cannot be blank. `True/False` or `1/0` are acceptable.

**Addresses and multi-select fields** Portions of the address field and other multi-select fields should always be separated by a vertical line | with no spaces inbetween. For example, an address may look like this:  
`Street|Street2|City|State|Country|ZIP.`

**Headers** If the add-on settings indicate that the CSV file has column headers, then they must exist in the file for the process to work. If the settings indicate that there are no headers, none should exist in the file.

You should configure your add-on to include a header if you have column names as the first row of your file. If you have data with no headers, make sure that option is cleared.

**Bad information** Each row of your CSV file must contain valid data. Jive will not create or update users where invalid information is provided.

Unicode is fully supported, but the process will ignore any rows that include HTML, JavaScript, or characters invalid for the destination field. No `□□□□□□` can be added to a username or an email address.

**Empty fields** If you want to pass an empty or null value, make sure the comma delimiters are included with nothing in between them.

**Text with commas** If you want to pass text that includes commas, such as biographies, titles, or free form text, you need to enclose the **entire field** value in double-quotes. For example, a title may look like this: "Director, Support".

## Monitoring email reports from Basic User Sync add-on

You can set up one or more email addresses to send reports to.

You can configure the same or different addresses for the successes and the failures. It is highly recommended that you at least setup a monitored email address for any possible failures to alert you to.

In the Add-On Configuration, check the right-hand side to make sure that valid email addresses are set to accounts that are monitored actively. Each daily sync (if enabled) generates at least one email with the details of what was synced from your CSV file.

## Managing federated users

Here you find details on managing federated users.

Unfederated users are ones that exist in Jive and are solely managed by the Jive application. Federated users are users in Jive that are managed by another system, such as Active Directory/LDAP or SAML SSO.

### Differences in federated users treatment in Basic User Sync

- Federated users never receive a welcome email. This is because the password is handled by another system. Note that even if you have welcome emails turned on, federated users will still not receive them.
- There is a special option that Jive can configure for you that deactivates any user not present in the nightly sync file. If this option is enabled, it will not disable the unfederated users in your system in order to leave local administration accounts active.
- If you are using SAML ID as your primary ID in the CSV file, email and username will automatically be used as a fallback lookup mechanism if a user is not found.

# 3

## Troubleshooting Basic User Sync

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### **SFTP access**

You need access to the Jive Secure FTP (SFTP) server available to customers for uploading the CSV files for the sync process.

To receive access, each customer (not each user) must submit a support case to request a username and password to the SFTP server the Basic User Sync add-on process works with. Ask [Support](#) to have your IP address whitelisted, along with the Basic User Sync servers, and any IP address that will be used for uploading CSV files on behalf of your organization.

### **CSV file on server**

Each Jive instance has its own Basic User Sync add-on installed and configured to point to a single CSV file in the Basic User Sync directory. This file must exist on the SFTP server with the same filename in order to process. The file must be .csv and not .xls or .xlsx.

### **Add-on installed and configured**

Each add-on must be configured with CSV file parameters, federation options, sync enabled, and other profile field mappings for the Basic User Sync add-on to add or update users.

*Here you can find typical activities for troubleshooting Jive Basic User Sync installation.*