Jive Interactive Intranet

Cloud Administrator Guide

Jive Extensions: User Group Sync Add-on

Aurea

Unlimited Possibility

Notices

For details, see the following topics:

Notices

Third-party acknowledgments

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Aurea global support

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.

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User Group Sync add-on

The Profile Sync add-on has two versions – one geared for **user groups** and the other for **social groups**.

As many of you know, social groups within Jive are designed to allow like-minded users to collaborate in a place that is relevant to their line of work and contributions to an organization. The administration and management of groups are designed to make sure that all the groups in your community are healthy and are delivering value to your organization. Having multiple empty or poor value groups in the community makes it more difficult to focus on and manage high-value activity, and can give a poor impression to users.

There are typically two main kinds of groups – those that provide business value at a global or strategic level, and those general groups that provide less value (either because of their purpose or their audience). Invest in the higher value groups by providing them with a greater level of support, and giving them more latitude regarding their activity levels.

Space and social group managers are responsible for starting, growing, managing, and monitoring their space or group – their 'place'.

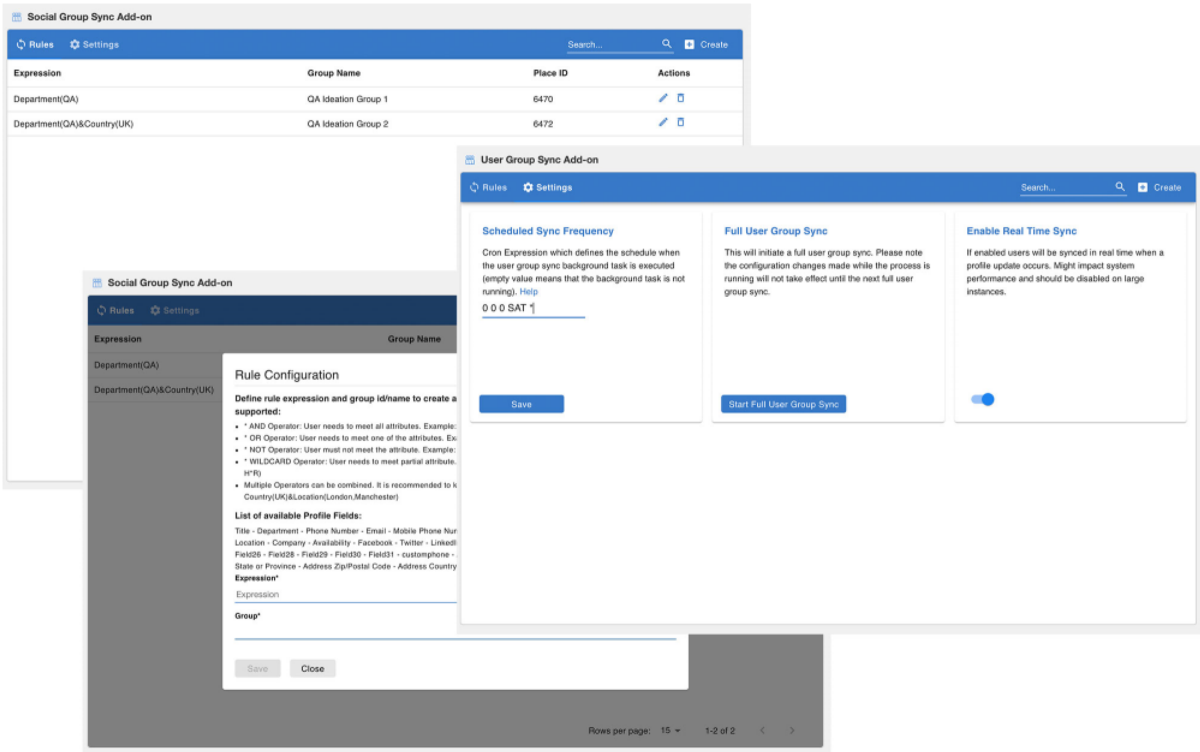
Profile Sync add-ons aim to solve a series of problems to help maintain healthy groups, including:

- Managing membership in user groups or social groups with ease with configurable rules based on user's profile information.
- Simplifying onboarding new employees into the correct collaboration groups without the need of manually inviting them, allowing employees to collaborate from day 1.
- Automatically reassigning employees when they switch departments or roles within the organization – keeping your memberships up to date and honest.
- Ensuring users have access to proper places that are most relevant to them.

With Profile Sync add-ons, administrators are able to create a series of dynamic and flexible rules, including, but not limited to the following:

- Expressions composed of a profile field name and value, for example, `Department(Sales)`
- Multiple field name and value pairs joined with `&` (AND operator) and `,` (OR operator), for example, `Country(UK)&Location(London)`
- Negating rules by adding `!` in front a field name and value pair, for example, `!Company(ABC Inc.)`

- Employing the wildcard operator `*` anywhere in the field name, for example, `Title(*Engineer*)`
- Adding multiple field values within parentheses using commas which denote an OR operator, for example, `Location(UK,US)`



With Profile Sync add-ons, administrators are able to create a series of dynamic and flexible rules which is required when striving to maintain healthy places.

For details, see the following topics:

- Installing User Group Sync Add-on
- Configuring User Group Sync Add-on
- Accessing the User Group Sync add-on
- Creating rules for the User Group Sync add-on
- Editing and deleting rules for the User Group Sync add-on
- Synchronization
- Other
- User properties (profile fields) supported
- Expressions in rules

Installing User Group Sync Add-on

Open a support with the Support to install this add-on.

Configuring User Group Sync Add-on

User Group Sync Add-on is an add-on that uses user groups for determining access.

Fastpath: **Admin Console** > **Permissions** > **User Groups**

Fastpath: **Advanced Admin Console** > **People** > **Management** > **Create User Group**

Fastpath: **User interface: Your avatar** > **Add-ons**

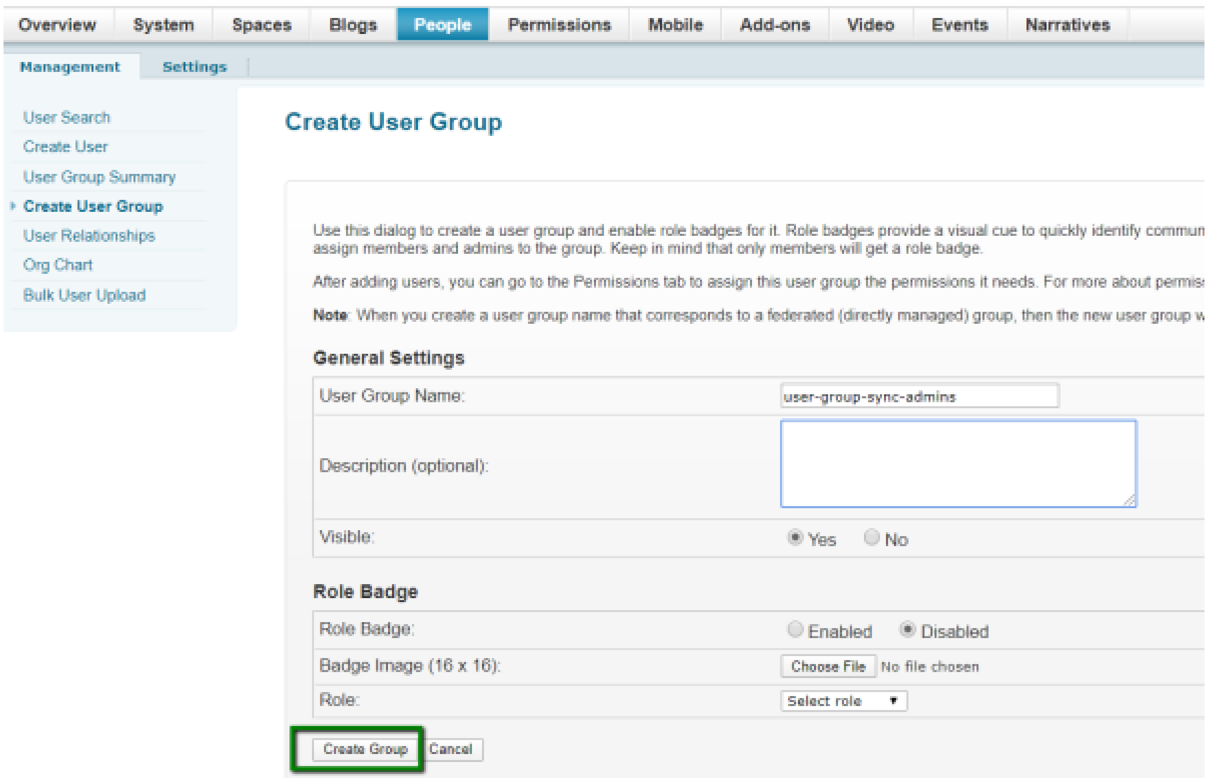
A user must have at least Manage System permissions to configure add-ons.

Configuring user groups for User Group Sync

The User Group Sync add-on uses user groups to provide secure access to the add-on features.

To configure user groups for the User Group Sync add-on:

1. Go to the user group configuration page:
   - **Admin Console** > **Permissions** > **User Groups**
   - **Advanced Admin Console** > **People** > **Management** > **Create User Group**
2. Under **General Settings**, enter a user group name and click **Create Group**.



For this example, we are creating a `user-group-sync-admins` user group.

3. Add the concerned administrators as members to this user group.
4. Save the changes.

Applying user groups to User Group Sync

Add the preconfigured user group (or groups) to the User Group Sync Add-on configuration to allow users of this group to use the add-on.

Fastpath: User interface: Your avatar > Add-ons

A user must have at least Manage System permissions to configure add-ons.

To configure user groups for the User Group Sync add-on:

1. Go to **User interface: Your avatar** > **Add-ons** > **All Add-ons** > **Installed** .
2. Find **User Group Sync** in the list, click **the gear icon** > **Settings** .
3. Under **App Security**, click the gear icon next to **User Group Sync**.

   User groups with access to the `user-group-sync-admins` feature are listed here. By default, the **All registered users** user group is used.
4. Remove **All registered users** and add the user groups which should have access to the feature.

   In this example, we are adding the `user-group-sync-admins` user group.

5. Click **Save Changes**.
6. Click **Configure now**.
7. Click **Save and Activate** to apply the changes.

Members of the specified user groups (`user-group-sync-admins` in the example) can now configure and use the User Group Sync add-on.

Accessing the User Group Sync add-on

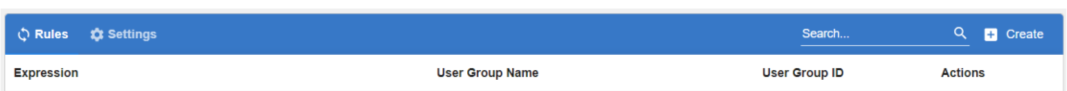
Here you can find details on asccessing the User Group Sync add-on.

The Configuration Panel for setting the User Group Sync Add-on rules is accessible via:

Fastpath:

- **Pencil Icon** > **User Group Sync**
- Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`

Attention: The Configuration Panel for the User Group Sync Add-on is accessible only to the members added in the user groups added to the add-on configuration, as described in Applying user groups to User Group Sync on page 9.



Creating rules for the User Group Sync add-on

Here you can find details on creating rules for the User Group Sync add-on.

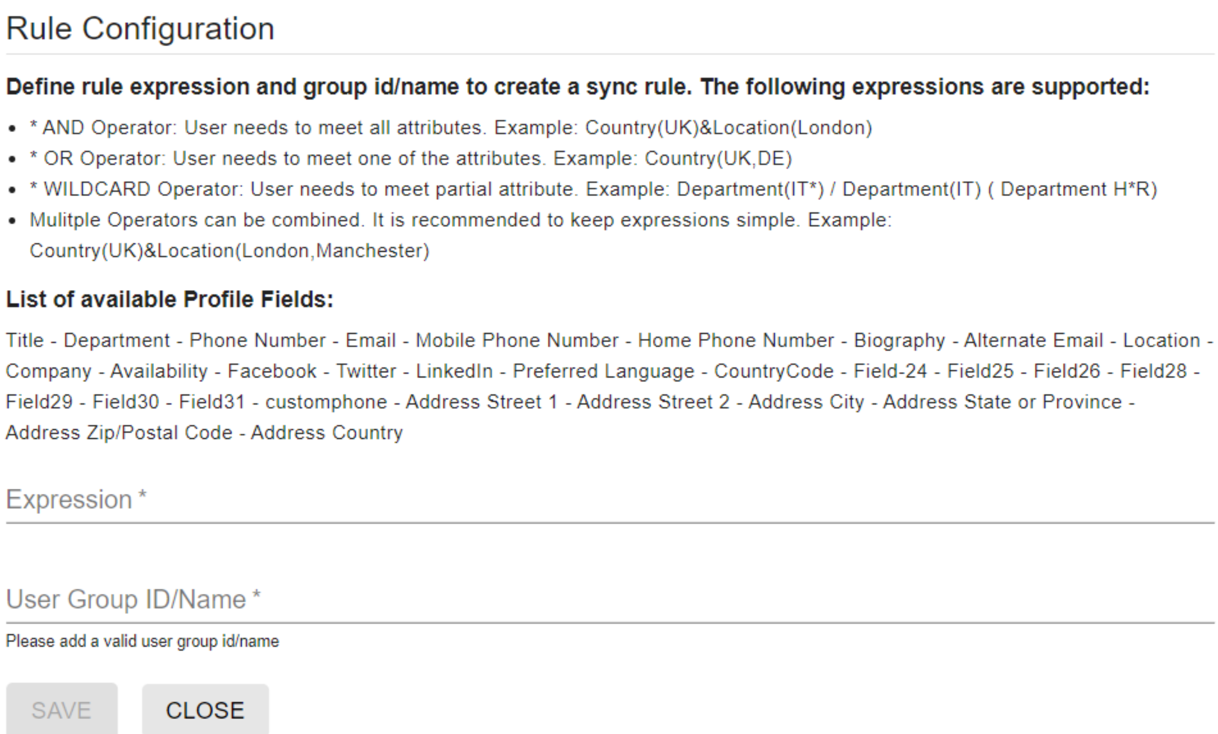
Fastpath:

- **Pencil Icon** > **User Group Sync**
- Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`

Attention: The Configuration Panel for the User Group Sync Add-on is accessible only to the members added in the user groups added to the add-on configuration, as described in Applying user groups to User Group Sync on page 9.

To set the **Rule Configuration** for a new rule:

1. Go to the add-on Control Panel:
   - **Pencil Icon** > **User Group Sync**
   - Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`
2. Click **Create+**.
3. Add an **Expression** using the relevant Profile Field(s) of the users who need to be added.
4. Provide the **Group ID/Name** of the Group to which the selected users are to be added.



5. **Save** the rule.

Group configuration created successfully.

Editing and deleting rules for the User Group Sync add-on

Here you can find details on editing and deleting rules for the User Group Sync add-on.

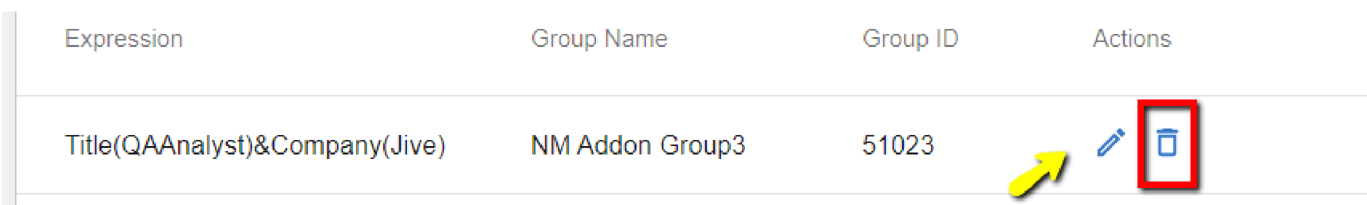
Fastpath:

- **Pencil Icon** > **User Group Sync**
- Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`

Attention: The Configuration Panel for the User Group Sync Add-on is accessible only to the members added in the user groups added to the add-on configuration, as described in Applying user groups to User Group Sync on page 9.

To edit or delete an existing rule:

1. Go to the add-on Control Panel:
   - **Pencil Icon** > **User Group Sync**
   - Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`
2. To edit a rule, select the pencil icon provided for the rule.
3. To delete an existing rule, click the Trash Can icon.



Caution: Deleting a rule: Item with group will remove all users added by the rule during the next sync execution.

Synchronization

Here you can find details on synchronizing the User Group Sync add-on.

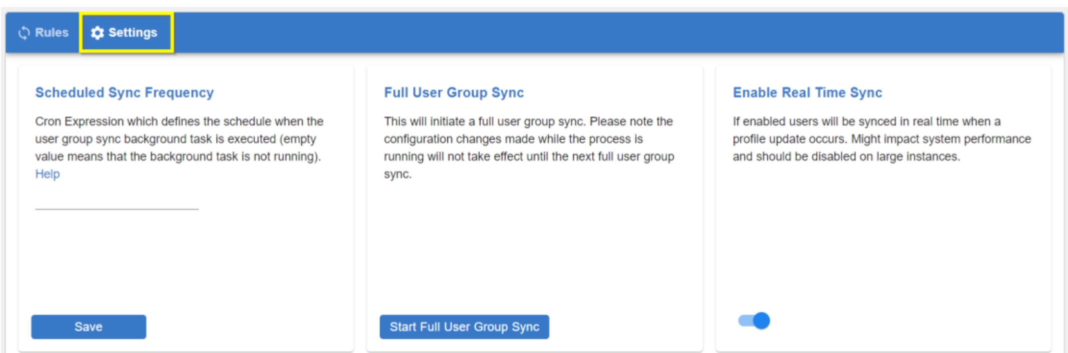
Fastpath:

- **Pencil Icon** > **User Group Sync**
- Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`

Attention: The Configuration Panel for the User Group Sync Add-on is accessible only to the members added in the user groups added to the add-on configuration, as described in Applying user groups to User Group Sync on page 9.

To edit or delete an existing rule:

1. Go to the add-on Control Panel:
   - **Pencil Icon** > **User Group Sync**
   - Direct link: `<instance URL>/apps/profile-user-group-sync-add-on`
2. Go to **Settings**.



   - **Scheduled Sync Frequency**: Cron job expression to define a schedule of sync.

     Note: Use Help for more information on how to set up the Cron expression.

   - **Full Group Sync**: Manual execution of sync.
   - **Real Time Sync**: Real-time update on user profile change. Might impact system performance and should be disabled on large instances.

Note there may be a latent update of approximately 15 seconds in processing the synchronization results.

Other

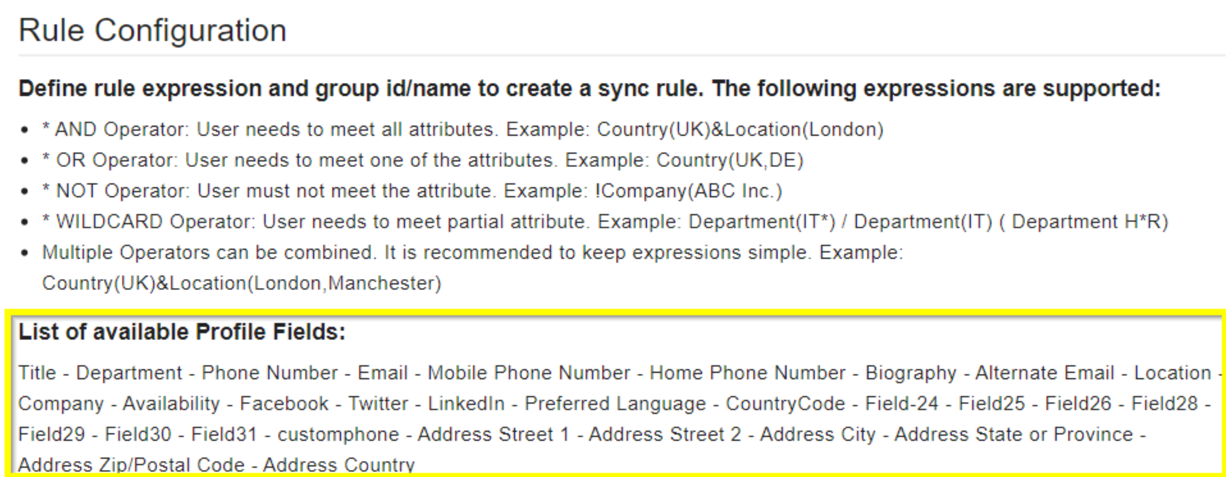
Here you can find other details.

- Users are added to or removed from the Jive User Group as Members (and not as Admins) if their Profile data meets the requirements of the Expression.
- Users are added, only if they are not already a member of the Jive User Group.
- Users can still be manually added to/removed from a Jive User Group.
- Users who are added manually to a Jive User Group will not be removed with rule update or deletion.

User properties (profile fields) supported

Here you can find the list of supported profile fields.

All fields displayed in the **List of available Profile Fields** in the **Rule Configuration** are supported.



Note that:

- Alternate Email: This is displayed as `Personal Email` in the **Admin Console** > **User Property** field.
- Custom fields: Relate to user-defined fields. For example: `CountryCode`, `customphone`, `Field-24`, `Field25`.
- Address fields: Relate to the fields under **Address** in the **Admin Console** > **User Property**. For example: `Street 1`, `Street 2`, `City`, `State or Province`, `Zip/Postal Code`, `Country`.

Attention: Date fields are not supported.

Expressions in rules

Here you can find the list of supported expressions in rules.

- Expressions comprise of a profile field name and value in parentheses, for example: `Department(Sales)`
- The field name should be an exact match of the Profile field name as given in the **List of available Profile Fields** on the **Rules Configuration** page:

List of available Profile Fields:

Title - Department - Phone Number - Email - Mobile Phone Number - Home Phone Number - Biography - Alternate Email - Location - Company - Availability - Facebook - Twitter - LinkedIn - Preferred Language - CountryCode - Field-24 - Field25 - Field26 - Field28 - Field29 - Field30 - Field31 - customphone - Address Street 1 - Address Street 2 - Address City - Address State or Province - Address Zip/Postal Code - Address Country

- Multiple field name and value pairs can be joined with:
  - AND operator `&`, where User needs to meet all attributes.

    Example: `Country(UK)&Location(London)`
  - OR operator `,`, where User needs to meet one of the attributes.

    Example: `Country(UK,US)`
  - WILDCARD operator `*`, where User needs to meet partial attribute.

    Examples: `Department(IT*)`, `Department(IT)`, `( Department H*R)`

Important: Multiple Operators can be combined. It is recommended to keep expressions simple. For example: `Country(UK)&Location(London,Manchester)`
