

UPP 1.2 - User Documentation

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Description

The User Profile Plugin enhances the functionality for Confluence user profiles. The user profiles can be centrally extended with additional elements. On top of that the plugin supports the synchronization of any attribute from external user repositories (e.g. Active Directory, LDAP) and the user profile by extending the LDAP integration functionality of Confluence. So the users are no longer required to update their personal data manually. Each profile element is searchable (additional ones too). User profiles can be displayed via two different macros. Your benefit: The data of synchronized user profiles is always up to date and can be used to display business cards or to search for contacts.

Installation

Supported Confluence Versions

Currently Confluence Versions 3.2 through 3.4.3 are supported.

Installing the Plugin

The plugin is available at the [Atlassian Plugin Repository](#). To install the plugin, log in as system administrator and navigate to the global administration (Browse > Confluence Admin). Enter the "Plugin Repository", search for "User Profile Plugin" and press "Install".

If the installation was successful, a new item should appear on the left panel in the "Administration" section: "User Profile Configuration". This where the customization of the user profiles takes place. If this link is not visible, please ensure that all required modules of the plugin are enabled. You can do this by clicking "Plugins" in the global administration and selecting the "User Profile Plugin". Of the listed modules only the module "profile" is not required for the plugin to work. Each other module should be enabled (green).

Exchanging the {profile}-Macro

The User Profile Plugin provides its own version of the "profile" macro (which is a part of the bundled plugin "Profile Macros"). The macro is required to display user data at the people directory, the hover for each user and at the personal space. This version behaves like the one from "Profile Macros" but displays adjusted profile elements too.

If you want to exchange the macros you have to apply the following customizations in the given order:

1. Deactivate the original "profile" macro from the Profile Macros:
 - Navigate to the global administration and select "Plugins" > "Profile Macros"
 - click "Disable" next to the module "profile"
2. Activate the macro "profile" from the User Profile Plugin
 - Navigate to the global administration and select "Plugins" > "User Profile Plugin"
 - click "Enable" next to the module "profile"



For exchanging the macros in Confluence 3.4 please refer to <https://jira.communardo.de/browse/UPP-46>

Licensing

Without an installed license the plugin runs in trial mode. This means you can only synchronize 10 users against your LDAP. Beyond that, there are no limitations to the functionality.

If you purchased a license it stays valid for one year. During that period you are entitled to support and to install updates for your plugin. After the year you can continue to use the plugin but it is no longer supported and falls into trial mode if you update it. You then have the option to purchase a renewal license which is less expensive than a full one. Each renewal license extends the validity of your plugin for another 12 months.

To purchase a license and provide it for the plugin please carry out the following instructions:

1. Go to the license settings page (Global Administration > Plugins > User Profile Plugin > Configure Plugin).
2. Decide for the kind of license you want to purchase: full or renewal
 - *A renewal license can only be applied if a full license was installed previously*
3. Click on the link that leads to your desired kind of license or directly navigate to the ShareIT Websites for the **full** or **renewal** license
4. Decide for how many users you have to purchase the license and choose the specific product.
 - *This has to match the amount of users you purchased your Confluence license for (provided that license is still valid)!*
5. Follow the instructions of the shop
 - At the last step ("Review Your Data") you have to provide the Server ID of your Confluence installation (section "Additional Ordering Information"). You can find the ID on the license settings page at the section "Product Information".
6. After you finished the ordering process, you will receive an e-mail with the license key.
7. Enter this license key (using copy & paste) into the text area below the section "License Key" on the license settings page and click on "Store License Key".
8. After that you should see the period of validity for your license.

Administration

Configuration

Accessing Configuration

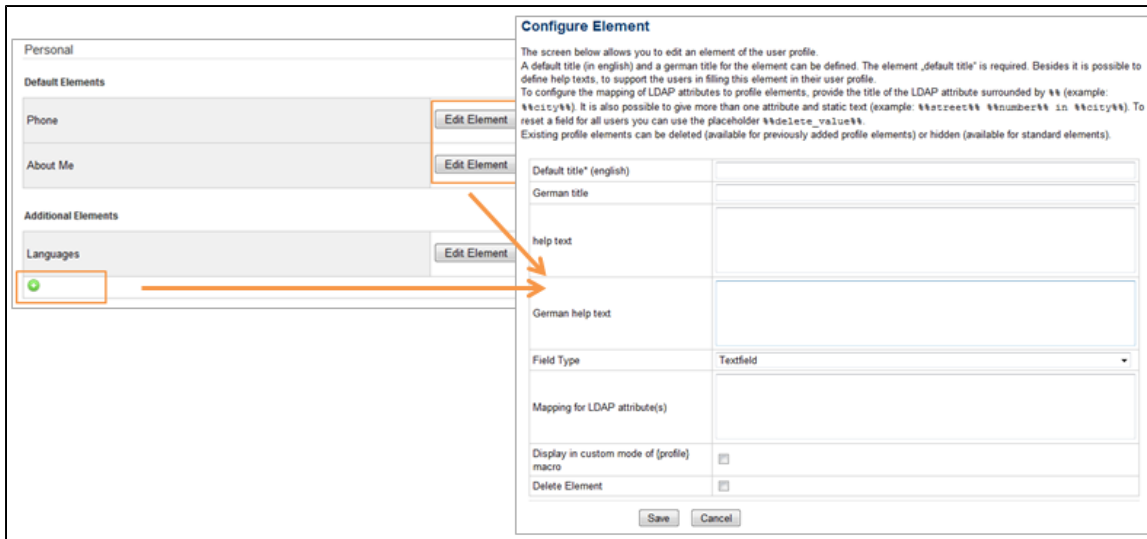
You can access the configuration via the menu item "User Profile Configuration" in the panel on the left side of the administration section (Browse > Confluence Admin).



Configuration of user profile elements

The configuration page allows you to add new elements for user profiles or to edit existing elements. This includes standard elements of the user profiles. The standard elements "Full Name" and "Email" cannot be manipulated in order to protect important system functionalities. Additional elements are placed at the end of the sections Personal and Company. It is recommended not to create more than 15 additional user profile elements.

This configuration will be used for all user profiles in the system.



The configuration page of an element allows you to edit an element of the user profile.

- A default title (in english) and a german title for the element can be defined. The element „default title“ and „type“ are required. Besides it is possible to define help texts, to support the users in filling this element in their user profile.
- The type of the element determines the kind of the element: You can choose "Text field" or "Text area". The latter is convenient for elements which might carry longer texts (like the "About Me" element) since it renders wiki markup too.
- The mapping of LDAP attributes can be provided for standard and additional user profile elements. It is also possible to relate more than one LDAP attribute to one user profile element. The mapping has to be provided by using the following syntax:
 - Any LDAP attribute has to be given as %%LDAP attribute%% (i.e. name of an LDAP attribute enclosed in %%).
 - You can also specify static text (e.g. %%street%% %%number%% in %%city%%).
 - Use %%delete_value%% as a placeholder to delete the data for a synchronized profile element.



Users cannot edit synchronized profile elements. An element is considered "synchronized", if the field "Mapping for LDAP Attribute(s)" in the customization form is not empty, even if the value of the mapped LDAP attribute is empty. This restriction only applies to users that are synchronized via LDAP. Local users can edit each profile element. Unknown LDAP attributes are recognized during synchronization and will be ignored. They are listed after each manual synchronization and produce a warning in the logs. For the data of the user profiles to be updated, a synchronization has to run first. See the next section on how this can be achieved.

- The checkbox "Display in custom mode of profile macro" defines if the element will be shown in the user profiles that are displayed by {profile:style=custom}
- Existing profile elements can be deleted (available for previously added profile elements) or hidden (available for standard elements). The data for hidden elements stays stored as long as the checkbox "Hide" is active and is displayed again after it is unchecked. When a previously added profile element is deleted, all the data belonging to this element is purged as well for each user.

Synchronization

There are 3 ways a synchronization can happen: Periodical or manual for all users (full synchronization) or at login for a single user. During this process the data of a users profile elements is updated with the values from the LDAP repository according to the mapping that was defined during configuration.

Manual Synchronization

The manual synchronization can be called from the configuration menu (there is a link at the bottom of the page). After clicking this link a full synchronization will happen. This means that the profile for every user will be synchronized according to your configuration. After the synchronization a short summary will be shown.



As a full synchronization is a resource consuming task, it should not be started during business hours.

Periodical Synchronization

A full synchronization will be executed periodically. The plugin is currently configured to start this synchronization at 1:11 a.m each night.

Single-User Synchronization

Whenever a user logs in its profile data is synchronized with the user repository. Note that the synchronization will only run for that single user.

LDAP Paging

The page allows you to configure paged requests for your LDAP connection. This might be useful if there are many users that have to be synchronized or if your LDAP is constrained to return only a limited amount of elements per request.

Usage

Editing the user profile

The edit modes for user profiles have been extended so that both administrators as well as users are able to adjust the data for additional profile elements. Elements of profiles for external (LDAP) users that are synchronized are not editable.

Searching the user profiles

With the User Profile plugin the data of **all** user profile elements is searchable. Hits will be displayed as link to the according user profile in the search result list. So users can be found by any information they provided in their profile.

The screenshot shows a search interface with a search bar containing '012345678*'. Below the search bar, there are search filters for 'Where' (All Spaces), 'What' (All Content), 'When' (Any date), and 'Who'. The search results list includes:

- Gerd Gerber (gerdg)**: 0123456787 Senior Software Developer Knowledge management Solutions Building 1, Room 1 Linux, C/C, Perl, Java, Java ME, OSGi, 05.07.1985 Certified XIV Engineer (CXE) M.Sc. Email: Gerd.Gerber@communardo.de
- Katrin Lindig (kali)**: 0123456788 Consultant Microsoft Solutions Building 2, Room 2 ABAP, SAP, Change Management, Java 02.03.1988 Consultant Certificate German (First language), English (Fluent) M. Sc. Email: Katrin.Lindig@communardo.de
- Heiko Henkel (heikoh)**: 01234 SCJP Heiko. Email: Heiko.Henkel@communardo.de Phone: 0123456788
- Bill M**: 0123456789 ICQNumber: 351601742 Software Developer Knowledge management Solutions Building 1, Room 1 JavaEE, Spring, Eclipse, JSF, EJB3.x, JavaScript, UML, SQL, DataWarehouse, DataMining, Business Intelligence, Testing 09.06.1984 Cisco Certified Network Associate 1&2, TOEFL B.Sc. Email: Bill.Martin@communardo.de

Profile macro

Displays the user profile of a certain user. Different modes support different styles of the user profiles.

The image shows two examples of user profile macros for Heiko Henkel:

- Minimal mode**: Shows a profile card with a photo, name, email, and phone number. Below it, the macro code is: `Above: {profile:mode=minimal}` and `Right: {profile:mode=full|edit=true}`.
- Full mode**: Shows a profile card with a photo, name, email, phone number, expertise, birthday, qualifications, title, languages, position, department, and location. Below it, the macro code is: `Edit Profile`.

Parameter

Parameter	Default	Description
user	none	Required Parameter, the username for the desired profile

mode (mode=minimal) (mode=custom) (mode=full)	full	Optional Parameter, the mode defines which elements of the user profile will be shown: <ul style="list-style-type: none"> minimal: the elements user name, e-mail and phone (an element "Mobile Phone" will be shown too if it has the same name) custom: selected elements of the user profile, according to the configuration of the user profile element full: all elements of the user profile, that contains data
edit (edit=true) (edit=false)	false	Optional parameter, shows a edit link to the owner of the user profile or not

Profilelist macro

Displays the user profiles of serveral users, according to the defined criteria.

 <p>Gerd Gerber Mail: Gerd.Gerber@communardo.de Phone: 0123456787</p>	 <p>Heiko Henkel Mail: Heiko.Henkel@communardo.de Phone: 0123456788</p>
<pre>{profilelist:criteria=java}</pre>	

Parameter

Parameter	Default	Description
criteria	none	Required Parameter, the criteria defines which user profiles will be shown. All user profiles that match the specified criteria will be shown. Multiple criteria can be separated by ','.
elementsperpage	6	Optional Parameter, defines how many user profiles will be displayed per page