Users

Overview

By default casual visitors are allowed to register themselves on your website to gain access to additional resources. For example, registered users might be allowed to submit resources or simulation tools. Your website implements a user registration policy which can be adapted to suit your particular requirements so you decide what additional resources are made available. You can disable user registration altogether if you prefer.

Users register themselves on your website using the "Register" link typically found in the upper right-hand portion of every page (position may vary). Once registered, users will log in to your website by entering their username and password using the login form found at http://yourhub.org/login. There are also links on the form to manage users who forget their usernames or passwords.

See Configuring Registration to learn more about changing registration settings.

User Manager vs Members Component

User Manager

A legacy go the Joomla! framework that powered previous HUBzero versions, the CMS comes with a User Manager accessed via the back-end from the "Users" drop-down of the main menu.

Members Component

HUBzero extended the standard Joomla! user profile with options for more demographic information (race, sex, etc.) and various other key pieces of information needed for such things as simulation tools. All this information can be accessed under "Members" in the "Users" list found in the main menu of the back-end administration.

When to use which

All user will have an entry in **both** the User Manager and the Members Component. Any information edited with one, such as changing a user's name via the User Manager, will also be automatically reflected in the other. Since the majority of fields in the User Manager are also represented in the Members Component plus considerably more fields, it is recommended that all user editing be done in the Members Component. The one exception concerns adjusting a user's access level (regular user vs. administrator, etc.). This is still done only with the User Manager.

Note: The, admittedly, confusing separation of Users and Members should be resolved in a future version; Functionality from the two components will be merged, providing a single interface for access user information.

Managing Members: User Permissions

Users who work closely with the administration of the Hub need to be given access prior to having these permissions. In order for users to gain these permissions, another Administrator of the Hub can give other members the same permissions. To give a user Administrator access, follow these steps:

1. Navigate to the administrative interface of the Hub, also known as the Backend
2. Once there, locate the Users tab and click it to open up a drop-down list
3. Click from the drop-down the User Manager button
4. On the "User Manager: Users" page, click on the name of the user that you wish to give Administrator access to
5. Inside the user's account information page, locate the "Assigned Access Groups" box and click the check box of "Administrator" or the desired group field you want the user to have permissions to
6. After this step, click on the button "Save & Close" to save the changes you made

Creating by Proxy

Proxy-creating users

Note: This feature has moved from https://yourhub.org/register/proxycreate to the administrator backend.

To create an account for another user:

1. In the backend, go to the Members component under the Users menu.
2. Click on the **+** button to add a new member.
3. Fill in the information about the new user.
4. Click **Save & Close** and if successful, you will be taken to the user's member backend information page.
5. At this point, if the hub's setting (found in a plug-in called **User - Joomla!** under Extensions>> Plug-in Manager) is set to send email out to newly-created users, the user will be sent an email about the account and credentials (example below). If email notification is off, the system will not send an email to the proxy-created user, and it will be up to you to let them know about their credentials.

```
From: Your Hub <support@yourhub.org>
Date: Thu, Nov 13, 2014 at 5:01 PM
Subject: New User Details

Hello [NAME HERE],

You have been added as a User to [YOUR HUB] by an Administrator.

This email contains your username and password to log in to https://yo
urhub.org/

Username: [USERNAME HERE]
Password: [PASSWORD HERE]

Please do not respond to this message as it is automatically generated
 and is for information purposes only.
```

Editing

Overview

Note: Editing of users is done through the HUBzero Members Manager component, **not** the User manager. Any changes made via the Members Manager will also be reflected in the User tables. Making changes with the User Manager can lead to data becoming out of sync.

1. First login to the administrative back-end.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of all installed components.

3. Choose **Members** from the available options.

4. You should now be presented with a list of all the members on your site. There are a variety of methods to find the specific person you wish to edit: you can search by such fields as name, email, and ID number. You may also scroll to the bottom of the page and navigate your way through the entire list. Once found, click the person's name to edit their information.

5. You may then edit their name, organization, employment status, etc.

6. Once you feel ready to save your changes, scroll back to the top of the page and click **Save** (the icon that looks like a floppy disk) in the upper right portion of the page.

Adjusting Access Level

The CMS offers various levels of access and privileges for users. All new accounts, by default, will be *Registered Users*, the access level with the least amount of privileges. Sometimes, you will need to grant a (trusted) user administrative access so they can manage content and portions of your hub. We strongly advise that administrative privileges be handed out rarely and with caution.

To adjust a user's access level:

1. First login to the administrative back-end.

2. Once logged in, go to the **User Manager**. The User Manager can be found by selecting **Site > User Manager** from the drop-down menu on the back-end of your HUB

installation.

3. Choose the user you wish to edit from the available list.

4. Once the page has loaded, find the **Group** option, found on the left-hand portion of the screen under the **User Details** grouping.

   The available access levels are as follows:

   - **Registered User***:* Normal visitors who register at the site. Can view Menu Items that have Access Level of Registered. Cannot edit or submit articles.
   - **Author***:* Can submit new articles for approval in the front end only. A Publisher or higher must approve. Cannot edit existing articles.
   - **Editor***:* Can submit new articles or edit existing articles from the front end only. A Publisher or higher must approve.
   - **Publisher***:* Can submit, edit, or publish articles from the front end only.
   - **Manager/Administrator/Super Administrator***:* Can do all of the above plus can log into the back end with increasing rights.

5. Select the access level desired for the user and then click **Save** (the icon that looks like a floppy disk) in the upper right portion of the page. Changes take affect immediately.

Deleting

Overview

In order to delete a user from your database, log in to the administration panel and choose **Site -> User Manager** from the top menu. On the opening page, select the checkbox to the left of the user's name you would like to remove and press the **Delete** button in the upper-right corner.

Looking Up

Overview

There will be times you need to track down a user's information for whatever reason. This can be a time-consuming task when presented with paging through potentially thousands of accounts. Luckily, there are multiple ways you can search and narrow down results quickly.

User Manager

Since information such as user ID, name, username, and email is kept consistent between the User Manager and Members Component, you can use either one to search for a specific account.

To search via the User Manager:

1. First login to the administrative back-end.

2. Once logged in, go to the **User Manager.** The User Manager can be found by selecting **Site > User Manager** from the drop-down menu on the back-end of your HUB installation.

3. You will be presented with a list of all users registered on your site.

4. Above the list of users are a few options for filtering results.

   On the left side is a search box. You can search for users by name, username, or email address.

   On the right side are a few select boxes that allow you to filter the users based on their access level (editor, administrator, etc.)—here, it's called **Group**—or log status (logged in/out).

5. Choose your method for filtering and the list of users will be narrowed down to match those criteria. Once found, click the person's name to view/edit their information.

Note: If you need to find an account to access more information than name, username, and email, it is recommended to search via the Members component.

Members Component

From the Administrative Back-end

Since information such as user ID, name, username, and email is kept consistent between the User Manager and Members Component, you can use either one to search for a specific account. The Members Component, however, will allow access to more details about a user's account. The extended demographic information provided by the Members Component, for example, cannot be accessed via the User Manager.

To search via the Members Component:

1. First login to the administrative back-end.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of all installed components.

3. Choose **Members** from the available options.

4. You should now be presented with a list of all the members on your site. There are a variety of methods to find the specific person you wish to edit: you can search by such fields as name, email, and ID number.

5. On the left side, above the list of members, is a search field for filtering the list. You can search by such fields as name, email, and ID number.

6. Choose your method for filtering and the list of users will be narrowed down to match those criteria. Once found, click the person's name to view/edit their information.

Default Settings

Private/Public Profiles

By default, new profiles are set to **private**. This means that only super administrators and the member him/herself may see and access that profile's information. Private profiles do not display in search results.

Public Profiles by Default

Member profiles may be set to public by default via the administrative Members component. To do so, log in to the administrative back-end and find **Members** in the **Components** list of the main menu. Once the Members manager page has loaded, locate the **Parameters** button in the toolbar (top right, opposite of the **Members** heading). Click this. You should be presented with a series of settings. Find **Default Privacy** and set to **Public**. All new accounts will now default to public profiles.

Note: any accounts created before changing this setting will retain whatever configuration they had. For instance, private profiles will remain private unless manually changed by the user.

Members

Publishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members.**
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be published. This would turn on the plugin allowing users to access it from their profile page.
4. Click **Publish** and the plugin will be turned on.

Unpublishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members.**
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be unpublished from the Hub. This would turn off the plugin taking it off their profile page.
4. Click **Unpublished** and the plugin will be turned off.

Clearing Existing Terms of Use Agreements

When terms of use are changed on the hub, it may be necessary to require users to re-accept the new terms. To reset all existing agreements, and force re-acceptance, go to the administrative interface and navigate to the members component. Click the "Reset terms of use agreements for all users" button, and confirm the action.

Password Rules

Creating a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Click **New** to create a new password rule.
4. Choose the rule that you are going to add more regulations to.
5. Insert the descriptions that define the rule.
6. Insert the failure message if the user fails to meet the correct regulations.
7. Click **Save & Close** to save the

Deleting a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Check the rule’s box and then click **Delete** to delete the rule.
4. The rule will automatically be removed from the Hub.

Editing a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Check the rule’s box and then click **Edit** to begin editing the rule.
4. Click **Save & Close** to save the newly edited material.

Plugins

Publishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be published. This would turn on the plugin allowing users to access it from their profile page.
4. Click **Publish** and the plugin will be turned on.

Unpublishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be unpublished from the Hub. This would turn off the plugin taking it off their profile page.
4. Click **Unpublished** and the plugin will be turned off.

Registration

Registration Fields

1. First log in to the administrative backend.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose **Registration** from the available options.
4. You should now be presented with a table of available user fields and their status for a particular action. This controls what fields the user will see, must fill in (required) or can fill in (optional) depending upon which action or state they are currently in. That is, you can make the username field required for the registration page (“create” column) but may not wish for your users to be able to edit this after creation (“read only” for the “update” and “edit” columns).
    - **Create column:** What the user sees on the registration page
    - **Proxy column :** What columns an administrator sees or must fill in when creating an account by proxy (i.e., for someone else)
    - **Update column:** What fields the user will see and/or must fill in if something has changed with what information is required at registration. An example of this would be if the “citizenship” field was, at one point, optional for registration but is now required. Setting this field to “Required” for the “Update” column will now require logged-in users to fill this information out.
    - **Edit column:** What fields the user will see and can edit for their user profile
    - **Field Option Definitions:** Required = Must fill in Optional = Can fill in Hide = Not visible Read only = Can view but cannot change
5. Once you feel ready to save your changes, scroll back to the top of the page and click **Save** in the upper right portion of the page. Changes take affect immediately.

Customizing Confirmation Email

All component layouts can be customized through overrides. Except for files that are provided in the Joomla! distribution itself, this method for customization eliminate the need for designers and developers to "hack" core files that could change when the site is updated to a new version. Because they are contained within the template, they can be deployed to the Web site without having to worry about changes being accidentally

User Authentication Plugins

A Hub can offer multiple ways for users to login through other services like LinkedIn, Facebook, ORCID, etc.

- Authentication-Certificate: Handles user authentication against client side SSL certificates
- Authentication-Facebook: Handles user authentication against Facebook
- Authentication-Google: Handles user authentication against Google
- Authentication-Hubzero: Default user authentication
- Authentication-LinkedIn: Handles user authentication against LinkedIn
- Authentication-ORCID: Handles user authentication against ORCID
- Authentication-Picas: Handles user authentication against Purdue's CAS
- Authentication-Twitter: Handles user authentication against Twitter

To activate these authentication plugins acquire a customer secret and customer key from the other service by registering your App on the service and selecting the Web format. Once you have the keys you can enable the plugins from the backend of the Hub.

1. Navigate to the backend of the Hub and locate the **Extensions Tab** and click on **Plug-in Manager**.
2. Inside of the **Plug-in Manager**, search for the authentication plugin.
3. Click on the title of the plugin and inside the plugin insert the **customer secret** and **customer key**.
4. Change the *Status* of the plugin to **Enabled** and then click **Save & Close**.

TLS Certificate Authentication

Certificate Authentication Plugin:

This plugin is in charge of actually checking the certificate, and creating new accounts or linking existing ones to the identity presented in the certificate. With this plugin on, users can login using their certificate credentials. If a link between those credentials exists, the process is complete and the user is logged in. If a link does not exist, the user is allowed to create a new account, thus linking their current certificate to the newly created hub account. A user can also elect to link their current certificate to an existing account, assuming they are able to provide the password for that existing account (in the event that someone already has an account on the system). This plugin is called: Authentication - Certificate.

Enable the Authentication - Certificate Plugin:

1. Navigate to the backend of the Hub and locate the **Extensions** tab.
2. Click on the **Extensions** tab and from the drop-down click on the **Plug-in Manager**.
3. Locate from the plugin list or through search the **Authentication - Certificate** plugin.
4. Click on the title of the plugin then locate the *Status* section inside the plugin.
5. From the *Status* drop-down, select **Enabled** then click **Save & Close**.

Certificate routing plugin:

This plugin handles the requirement for a certificate to be present while browsing the site. While the authentication plugin is what checks and links the user to the cert, other authentication could still be allowed. With this plugin enabled, a certificate must be present and authentication options are limited to just certificate based authentication. This plugin is called: System - Certificate.

Enable the System - Certificate plugin by following the same steps listed out above.

New account approval:

This allows admins to require approval of new accounts prior to their being able to access the site. When this is enabled, accounts pending approval can be found in the users manager on the backend. You can also elect to turn on an administrative dashboard module that lists accounts pending approval. And in the users manager parameters, you can enable administrator notifications to receive an email when new accounts are created. This allows the certificate->user link to be user initiated (rather than admin initiated), but still gated and admin approved.

In terms of apache configuration, "SSLVerifyClient optional” should be set. This will allow the certificate to be included, but also allow the CMS to handle the requirement for the certificate through the use of the certificate routing plugin mentioned above. "SSLOptions +StdEnvVars" should also be set, as I'm sure it already is for you all. Lastly, make sure the site is forced to SSL via the Joomla global configuration on the backend.

Note: In order for this feature to be useful, all users need to gain a TLS Certificate and have it implemented in their browser prior to utilizing this authentication process.

Member Import

Overview

The members bulk importer/updater is designed to allow a site administrator to bulk import or update member data. Due to its ability to mass upload/modify accounts, it is an administrator only feature.

Warning!

The improper use of this feature can have damaging consequences. Use with caution.

The member should only be used in special circumstances. Minimum requirements for the CSV (first name, last name, username, password, etc.) and any additional registration fields (member demographics) must be gathered by and administrator for every new account to be imported. In most cases it is more time effective and less error prone for a new members to enter this information in the registration form instead of passing the information through the administrator.

Registration Fields

The member importer follows the parameters set in the registration component. If a registration field is required during the initial registration form (organization, for example), the field must be included in the uploaded CSV file in addition to the required fields for the CSV. Not all registration fields are available via the member importer, those should be collected from the new member on the next login, if desired.

CSV Preparation

1. Log into the administrator of the hub, i.e. https://hubname.org/adminsitrator
2. Navigate from the main menu to **Users -**> **Members**, from the page menu under the title **Members**, click on the **Import** tab (last one on the right).
3. Find the control button at the top, right of the page. Click on the left most button that looks like a grid to download the example CSV.
4. Save the file with a different filename that represents the group of new members you will

be importing.

   1. Note: Do not save it in Excel format, the import only accepts CSV files.

5. Edit the CSV. Remove the word "Example" from all fields and enter the required fields and those required as set by registration. See the example below that was importer successfully previously.

uidNumber	**name**	**username**	**email**	**registerDate**	**homeDirectory**		**us d**
	Hub Man	hubman	hubman@hubzero.org		/home/hubzero/hubman		N T

countryresident	**countryorigin**	**gender**	**url**	**reason**	**mailPreferenceOption**		**usage nt**
US	US					1	

nativeTribe	**phone**	**givenName**	**middleName**	**surname**	**picture**		**vip**
		Hub		Man			

note	**locked**	**orcid**	**interests**	**race**	**disability**

1. CSV field descriptions.
   - uidNumber: Typically leave blank when creating new accounts.
   - name: Full name is required. First name and Last is usually enough.
   - username: Required. If not provided and admin must choose an somethign appropriate.
   - email: Required. Please only use valid email addresses. Emails will be send to the member.
   - registerDate: Leave Blank
   - homeDirectory: Required. Administrator must know the member home directory path to be created. For example, "/home/example/hubman" (/home/hubname/username).
   - userPassword: Required. Must be randomly generated and will be provided to

  the new member in plain text. The new member will be asked to reset the password when first logging on.
  - orgtype: Optional. Depends on the set registration parameters.
  - organization: Optional. Depends on the set registration parameters.
  - countryresident: Optional. Depends on the set registration parameters.
  - countryorigin: Optional. Depends on the set registration parameters.
  - gender: Optional. Depends on the set registration parameters.
  - url: Optional. Depends on the set registration parameters.
  - reason: Optional. Depends on the set registration parameters.
  - mailPreferenceOption: Required. 1=agree to send newsletters, etc., 0=disagree to send newsletters,etc.
  - usageAgreement: Required. 1= agreed. 0=disagree, must agree when logging on for the first time.
  - modifiedDate: Leave blank.
  - emailConfirmed: Required. 1=member account is emailed confirmed, 0=new member must confirm (click on a link and login) the account via email.
  - regIP: Leave blank.
  - regHost: Leave blank.
  - nativeTribe: Leave blank.
  - phone: Optional. Depends on the set registration parameters.
  - givenName: Required. Usually the First name of the member.
  - middleName: Optional.
  - surname: Required. Usually the Last name of the member.
  - picture: Optional.
  - vip: Optional.
  - public: Required. 1=public, 0=private.
  - note: Optional.
  - locked: Optional.
  - orcid: Optional.
  - interests: Optional.
  - race: Optional.
  - disability: Optional.

Creating a new import and uploading a completed CSV

1. Login to the administrative side of the Hub.
2. Click the **Members** tab and from the drop-down click on **Import**.
3. From the control button on the top right of the page, click on the button with the plug icon.
4. In the new page that opens, enter a name for the import and a short description.

5. Below the description, choose the desired parameters.
    1. Approved: Typically set to yes.
    2. Email new member: If yes, an email will be send to the email entered into the CSV providing the member with their login and password in plain text.
6. In the top right column, click **Upload** to upload a CSV file. From the control buttons at the top right, click **Save**.
7. Select your CSV.
8. Select the desired mode:
    1. Update: when creating new members
    2. Patch: for correcting fields of existing members (be sure the CSV is configured appropriately).
9. From the control buttons at the top right, click **Save & Close**.

Running (and a test run) the import

Run a test. It is always a good idea to do a test run before actually importing or updating many members.

1. Select the import you wish to test run by checking the box next to the CSV title.
2. Click on the **Test Run** button.
3. You will be directed to a page with a count down. You may click on the button in the middle of the page to run the import immediately or wait for the downtime to complete.
4. After the import run has been completed, you will see the results displayed below the progress bar.
5. Click on each item will display details for each record.

Running the import (after a test run)

1. After the test run, check a few records to make sure that everything looks OK.
2. Click on **Run for Real** button, that is just under the expired countdown.
3. The real import run will complete in a few moments and display results below the progress bar.

4. The import is now complete.