



User Layout – Template Users

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1.0 Introduction

The purpose of this document is to define the concept of portal template users and to explain how template users are configured and managed. The administration of template users requires the participation of a portal administrator and possibly an LDAP administrator. In this document “LDAP” is used as a generic term for a user directory solution. Other products such as Microsoft Active Directory and Sun One Directory are interchangeable in this context.

It is important to note that template users are only relevant to institutions utilizing LDAP authentication. The portal database does not accommodate template users out of the box. Non-LDAP institutions can still create a default layout, but it is not possible to assign users to multiple template users without custom development.

The information in this document pertains to Academus 2.0, which is built upon uPortal 2.4.2.

2.0 Template user definition and configuration

What are Template Users?

Portal functionality allows you to define separate layouts (tab/channel/skin configurations) for each user type you wish to set up. Template users enable you to manage these user-type-based portal layouts. For instance, you are likely to have a certain layout of channels that is appropriate for students (lunch menu, class registration, classifieds), which is different from the channel layout that is appropriate for your faculty members (discussion forums, payday calendar, chat room administration). By managing your template users you are able to define the layouts that are seen by each of your user types (students, faculty, staff, etc.). In addition, template users also control the default groups to which users are assigned upon their first portal logon. Thus, you also control default group affiliation via template users.

How are Template Users created and configured?

The following steps detail the creation and configuration of a template user. Please refer to section 2.3 for information on the template users set up during your Academus installation.

Step 1: Create the template user

The template user can be created in either the portal database or in LDAP. The template user is created as a standard user, with a username that is descriptive of the user type that will follow the template user's layout.

To create a template user that will define the layout for all portal users who are freshmen, add a user called "freshmen" to the portal database or LDAP. Standard practice is to enter a first name of "Freshmen" and a last name of "User". If you are adding the user to your LDAP, your LDAP administrator would create the user enter "freshmen" as the username. When the account is created, please make sure that the attribute that identifies the template to be used is not "freshmen". If you are adding the user to the portal database, you would use the User Administration channel to add the user.

Step 2: Configure the template user's layout

Template users control the default layouts for each user type.

To configure the template user's layout, log in to the portal as user "freshmen". Using the [Preferences](#) link, set up the freshmen user's layout to include the desired tabs, channels, and skin. When you are finished, log out.

Step 3: Assign the template user to the appropriate group(s)

Template users control the default groups to which user groups are assigned. The Groups Manager channel is used to assign users to the appropriate default groups.

To assign a group affiliation for the template user "freshmen", log in to the portal as an admin user and add the user "freshmen" to the group Everyone -> Students.

Step 4: Configure Academus to utilize template users

Template users are simply portal users that have been set up for the purpose of managing user layouts. There is no database field or portal setting that designates a specific user as a template user. **A user exists as a template user when there is a reference in LDAP to the template user name.**

The first step to configure Academus to utilize template users is to designate the field within LDAP that holds or will hold the template user value. This field will vary based upon the LDAP schema utilized by your institution. An example of a standard schema within LDAP is the eduPerson schema. Within the eduPerson schema, the eduPersonPrimaryAffiliation field is typically used to store a value that can be used as the template user value such as “student”, “staff” or “faculty”.

In this example, the Academus portal administrator will set the following attribute in the PersonDirs.xml file:

```
<attribute>
  <name>eduPersonPrimaryAffiliation</name>
  <alias>uPortalTemplateName</alias>
</attribute>
```

The LDAP administrator will update LDAP to include the value of “freshmen” in the eduPersonPrimaryAffiliation field for each portal user who is a freshmen, if the field is not already populated with this value.

Step 5: Verify successful completion of the template user setup

To verify that the template user setup was successful, log in to the portal as an LDAP user who has a template user value (in this case, the value in “eduPersonPrimaryAffiliation”) of “freshmen”, and who has never logged in before. If you are presented with the tab, channel, skin, and group settings that you configured for user “freshmen”, you have successfully set up this template user.

Does Academus come with default template user settings?

Yes, during your deployment of Academus you are asked to define the default groups/tabs/channels for a maximum of 5 template users. These are set up during your installation. If you elect to take the default template user setup, you will find the following template users in your portal:

- admin
- student
- faculty
- staff
- demo
- guest

These template users are set up by Unicon using the process defined in section 2.2 above, and are available for you to use/update/manage as soon as your deployment is complete. Your Deployment Lead will provide you with passwords for these users.

The first four template users listed -- “admin”, “student”, “faculty”, and “staff” -- are easily recognizable as typical campus user types that might be required by an educational institution. In contrast, the uPortal framework, by default, requires the existence of the last two template users, namely “demo” and “guest”.

Template user “demo”

You may be wondering what happens if a portal user does not have an appropriate template user value in his/her eduPersonPrimaryAffiliation field. If the attribute is not populated, or contains a value that is not the name of a valid template user, the user will receive the layout and group assignment of the template user “demo”. Demo is the default user layout designated in the uPortal framework, however this is a configurable setting. To change the default template user, identify the following line of code in the “portal.properties” file, and replace “demo” with the desired template user name:

```
org.jasig.portal.services.Authentication.defaultTemplateName=demo
```

Once this value has been changed, the user template you designated will be the default layout provided for portal users who have missing or invalid template assignments.

Template user “guest”

By default, the uPortal framework uses the template user “guest” to manage the pre-authenticated portal layout. This is the screen you will see when you access the main page of your portal where you are prompted to log in. In order to change the layout of the pre-authenticated portal page, you simply log in as “guest” and configure the layout and skin as desired. Important note: after updating the guest layout, you must restart the portal in order to see your changes. This is true only for the template user guest and the layout of the pre-authenticated portal page.

3.0 Managing template users

It is important to understand the behavior between the portal and LDAP when managing template users.

Template user values are retrieved once per user

When a portal user logs in, the portal queries LDAP for the value in the user's eduPersonPrimaryAffiliation field. This value is then saved in the portal database to designate whose layout the user should point to upon login. This value is saved once, and referenced upon each login. Hence, any change made in a user's eduPersonPrimaryAffiliation value WILL NOT be recognized by the portal after the user's first logon.

Changes made to template user layouts will be visible to users associated to the changed template

It is expected that template user layouts will need to change over time. When a template user layout has changed and the template user has logged out, users associated to the template user will see the changes upon their next log in. This is true only in the case where the user has not made manual modifications to his/her layout (see next section).

Users break affiliation with template users if they make changes to their layout

Once a portal user logs in and makes a layout change, such as adding or moving a channel, the user will no longer follow the layout provided for the template user. After the layout is changed, any updates made to the template user layout will not be visible to the portal user who has modified his/her layout.

In the case where you do not want your users to make any changes to their layouts, you can elect to lock down the preferences functionality within Academus. This can be performed via manual manipulation of the portal database. If this is of interest to you, contact Academus Customer Support for more information about this option.

There is no automated way to reset user layouts

The current implementation of uPortal does not provide a way via the GUI to reset user layouts. The scripts included in the Appendix (A1 and A2) provide a manual process for resetting user layouts.

4.0 Appendix

As in any case where database modifications are necessary, we recommend making a database backup before running any SQL scripts.

A1. Reset all user layouts

```
*****
*
* File:          <reset_all_user_layouts.sql>
*
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*
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* consent of Unicon.
*
*****

*****
This SQL query will reset the layout for every user, with the exception
of the following users: admin, system, demo, guest, faculty, staff, and
student. You will need to copy this query and paste it into your
SQL command prompt.
*****
delete from up_user_layout_aggr
where user_id not in (select user_id from up_user where user_name in ('admin',
'system', 'demo', 'guest', 'faculty', 'staff', 'student'));

update up_user_profile set layout_id = null, structure_ss_id = null, theme_ss_id
= null where user_id not in (select user_id from up_user where user_name in
('admin', 'system', 'demo', 'guest', 'faculty', 'staff', 'student'));

update up_user set next_struct_id = null where user_id not in (select user_id
from up_user where user_name in ('admin', 'system', 'demo', 'guest', 'faculty',
'staff', 'student'));

delete from up_layout_struct_aggr where user_id not in (select user_id from
up_user where user_name in ('admin', 'system', 'demo', 'guest', 'faculty',
'staff', 'student'));

delete from up_layout_restrictions where user_id not in (select user_id from
up_user where user_name in ('admin', 'system', 'demo', 'guest', 'faculty',
'staff', 'student'));

delete from up_ss_user_atts where user_id not in (select user_id from up_user
where user_name in ('admin', 'system', 'demo', 'guest', 'faculty', 'staff',
'student'));

update up_ss_user_parm set param_val = 'academus' where user_id not in (select
user_id from up_user where user_name in ('admin', 'system', 'demo', 'guest',
'faculty', 'staff', 'student')) and param_name = 'skin';
```

A2. Reset user layout

```
*****
*
* File:          <reset_user_layout.sql>
*
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*
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*
*****
```

To reset a specific user layout, replace the example user_id (1111) with the correct user_id. Once these queries are executed against the database, the user will be able to re-login to the system and get the designated template user layout.

```
delete from up_user_layout_aggr
where user_id = 1111;
```

```
update up_user_profile
set layout_id = null,
structure_ss_id = null,
theme_ss_id = null
where user_id = 1111;
```

```
update up_user
set next_struct_id = null
where user_id = 1111;
```

```
delete from up_layout_struct_aggr
where user_id = 1111;
```

```
delete from up_layout_restrictions
where user_id = 1111;
```

```
delete from up_ss_user_atts
where user_id = 1111;
```

To change a user's skin, replace the example user_id (1111) with the user_id of the user whose skin you want to change and replace the user_id (2222) with the user_id of the user who has the skin that you wish to assign to user_id (1111).

```
update up_ss_user_parm
set param_val = (
    select param_val from up_ss_user_parm
    where user_id = 2222 and param_name = 'skin')
where user_id = 1111
and param_name = 'skin';
```