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Managing Users with Access and Workflow

2016 OmniUpdate User Training Conference Activity Guide

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Managing Users With Access and Workflow

Access and workflow are important administrative tools when using the OU Campus™ content management system (CMS). When wielded properly, they can be powerful and effective methods of administrating the system and can create a friendly experience for end users. Access settings can be utilized to provide or restrict access to various areas of the site. They can also be assigned to content, such as templates, and other content-related features. Workflow is used to control what users can publish. Along with access, workflow helps control where people can edit, who can publish, and who needs to review content before it is published.

When implementing a new site or several new sites, it is advisable to plan out the expected functionality in terms of workflow within the system prior to creating groups and assigning permissions. The reports available in Custom Reports can help identify the groups that are needed to make the site function as desired. Even after groups have been established, the CMS ensures that user settings and group membership can be easily changed and assigned groups can be removed or changed.

All access settings are available to Level 10 administrators. Level 9 administrators have limited access; they can only change the access settings for editing based on a defined access group. Level 9 users may also make the changes recursive and change the access group for an asset. Level 10 administrators have access to all sites within in an account. They have access to change all access settings within the site. In the case where Level 10 administrators should not have access to other sites, then the sites should be set up under different accounts. This allows for having different user databases and separate administrators.

Pre-planning access to sites, directories, pages, and specific editing regions on pages is very important for management over the long haul. When managing access, consider what content groups of users should be able to edit. First create groups of users, then build access (or editing rights) around these groups. Doing so will make it easier to manage access to sites, directories, files and editable regions by adding and deleting users to and from those groups. Remember that only Level 10 administrators can create users and groups, and that all Level 9 and Level 10 users ignore groups and access, effectively giving these users access to everything on the site.

To get started, first log into the workshop site: [workshop[#].outc16.com](workshop[#].outc16.com)

1. Navigate to the homepage by using the personalized link on your workshop insert.
2. Replace [#] with the number on your workshop insert.
3. Click on the **DirectEdit** link found on the page, which for the conference is the words "Last Updated" followed by a date.
4. Log into OU Campus using the administrator username and password.

Creating a User

Purpose: To understand how users are created and the various settings that can be assigned.

Objective: To create a new user with a defined password, designated permissions level, approver, and upload capabilities.

1. Navigate to the **Users** view by selecting **Setup > Users**.
2. Click **New**.

3. Give the user a **Username** in the **User Information** panel.
4. Assign a **Password** in the **User Information** panel.
5. Enter the user's **First Name** in the **User Information** panel.
6. Enter the user's **Last Name** in the **User Information** panel.
7. Assign a **User Level** from the drop-down menu in the **Restrictions** panel.
8. Assign an **Approver** from the drop-down menu in the **Restrictions** panel.
9. **Enforce Approver** by checking the box.
10. Click **Create**.

Creating a Group

Purpose: To understand how a group is created and members added to it.

Objective: To create a group and add members to it.

1. Navigate to the **Groups** view by selecting **Setup > Groups**.
2. Click **New**.
3. Give the group a **Name**. Keep in mind that this cannot be changed once saved.
4. In the **New Group** modal, add users from the **Available Users** list to the **Members** list using the arrow keys.
5. Click **Save**.

Assigning a Group to a Directory

Purpose: To understand the process of how a group is assigned to a directory.

Objective: To change the Group to a different group.

1. Navigate to the **Pages** list view and hover over a directory's row to display the available actions.
2. Select **Access** from the **Edit** menu.
3. In the **Access Settings** modal, select the new group from the drop-down menu labeled **Access Group**.
4. Click **Save**.
5. Test by logging in as a member who is not part of the group, and verify that the directory is inaccessible.

Creating a Toolbar

Purpose: To understand how a custom toolbar can be created and used to restrict access to specific editing features.

Objective: Create a custom toolbar and test the changes.

1. Navigate to the **Toolbars** view by selecting **Setup > Toolbars**.
2. Click **New**.
3. Give the toolbar a **Name**.
4. Deselect the checkbox next to any tool to disable it, and select the checkbox next to any tool to enable it.
5. Select the radio button for **All Paste Options** or **Paste as Plain Text Only**.
6. Click **Create**.

Assigning a Toolbar to a User

Purpose: To understand how a custom toolbar can be assigned to a user to restrict access to specific editing features.

Objective: Assign a custom toolbar to a user and test the changes.

1. Navigate to the **Users** view by selecting **Setup > Users**.
2. Hover over the user's row to display the available actions and select **Edit**.
3. Navigate to the **Restrictions** panel and select the toolbar from the **Toolbar** drop-down menu.
4. Click **Save**.
5. To test, sign in with the user and open a page for editing. The toolbar defined in the **Restrictions** panel will be displayed in the **WYSIWYG Editor**.

Assigning a Toolbar to a Page or Directory

Purpose: To understand how a custom toolbar can be assigned to a page or directory to restrict access to specific editing features.

Objective: Assign a custom toolbar to a page or directory and test the changes.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over the page or directory's row to display the available actions.
3. Select **Access** from the **Edit** menu.
4. Navigate to the **Restrictions** panel and select a toolbar from the **Toolbar** drop-down menu.
5. Click **Save**.
6. To test, sign in with any user and either edit a page with the assigned toolbar or create a page in the directory to which the toolbar was assigned and the user will have access to the toolbar defined in the **Restrictions** panel. Make sure the same toolbar is not assigned to the user selected.

Assigning a User Group to a Template

Purpose: To understand how assigning a group to a template restricts access to the template.

Objective: Edit the group that has access to the New Section template and test the changes.

1. Navigate to the **Templates** view by selecting **Setup > Templates**.
2. For the **New Section** template, change the user group assigned by selecting a new group from the **Access** drop-down menu.
3. Click **Save**.
4. Log out and log in as a user from a group other than the one assigned to the template.
5. Navigate to the **Pages** list view by selecting **Content > Pages** and into a directory with a template group that has the **New Section** template assigned.
6. Click **New**.
7. Notice that the **New Section** template is not available.
8. Log out and log back in as a user in the group that is assigned to the template.
9. Navigate to the same directory.

10. Click **New**.
11. Notice that the **New Section** template is available.

Creating a New Template Group

Purpose: To understand how to configure a template group.

Objective: Create and assign a Template Group.

1. Navigate to the **Template Groups** view by selecting **Setup > Templates**.
2. Select the **Template Groups** menu item in the **Left Navigation** menu.
3. Click **New**.
4. Give the group a **Name** in the field. For example, "News Page Only."
5. Select which templates should be available in the group, as well as whether or not the **New Folder** option should appear.
6. Click **Save**. The template group is now displayed in the **Template Groups** view.

Assigning a Template Group to a Directory

Purpose: To understand how to assign a template group to a directory and restrict access to what type of content users can create.

Objective: Assign the new template to a directory and observe the restrictions by attempting to create a new page.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a directory's row to display the available actions.
3. Select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, select the new template group from the **Template Group** drop-down menu.
5. Click **Save**.
6. To test, navigate to the directory to which the template group was assigned.
7. Click **New**. The only templates that should be available are the ones from the template group.

Changing Access Settings for a Page or Directory

Purpose: To understand how access settings work and how to modify an existing page or directory's access settings.

Objective: Access and change the access settings for a page.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over the target page or directory's row and select **Access** from the **Edit** menu.
3. In the **Access Settings** modal, change the group from the current selection to a different group using the **Access Group** drop-down menu.
4. Modify additional settings as desired.
5. Click **Save**.
6. Test by logging in as a user not part of the group, creating a new news page to test RSS, etc.

Setting Recursive Options

Purpose: To understand what recursive options do with regards to content publishing and editing.

Objective: Apply recursive settings to a folder and all files contained within that folder.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over the target directory's row.
3. Select **Access** from the **Edit** menu.
4. In the **Recursive Modification** section of the **Access Settings** modal, select the radio button for the option **Apply Selected Settings to This Folder and All Enclosed Files and Folders**.
5. Select the options to be changed recursively by checking the checkbox in front of the option and making the desired change.
6. Click **Save**.
7. Test the changes in multiple files.

Setting Directory Variables

Purpose: To understand how directory variables work and how they can be used to create variations of content.

Objective: Create a directory variable.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over the target directory's row to display the available actions.
3. Select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, navigate to the **Directory Variables** section.
5. Click **Add**.
6. Add a new default image location using ox_ftp_image_root in the **Name** field and by defining a valid image path in the **Value** field.
7. Click **Save**.
8. Test the new variable by editing a page in the directory, and inserting an image by browsing for the file.

Changing Access Settings for an Asset

Purpose: To understand how access settings work and how to modify an existing asset's access settings.

Objective: Access and change the access settings for an asset.

1. Navigate to the **Assets** list view by selecting **Content > Assets**.
2. Hover over the target asset's row.
3. Select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, change the group from the current selection to a different group using the drop-down menu labeled **Access Group**.
5. Click **Save**.
6. Test by logging in as a user not part of the selected group and navigate to **Content > Assets.** The asset in question should be locked and uneditable.

Practicing Workflow

Purpose: To understand the process of sending a page through a workflow in OU Campus.

Objective: Submit a page for approval to a higher-level user, reassign a page, and then approve or decline pages.

1. Log in to OU Campus using the Level 6 username and password.
2. Navigate to a page using **Content > Pages.**
3. Make edits to the page and **Save** the changes.
4. In the **Publish** drop-down menu, click **Submit for Approval.**
5. In the following modal, select the Level 8 approver as the user to whom the approval will be sent. Add a **Subject** and **Message** and click **Submit.**
6. Repeat steps 1-5 for another page.
7. Log out of the Level 6 user and back in as the Level 8 user.
8. Navigate to **Dashboard > Workflow**.
9. Click on one of the files that was sent from the Level 6 user to **Preview** it.
10. **Publish** the page and view the page in a new window to view the changes.
11. Navigate back to **Dashboard > Workflow** and click on the second page sent from the Level 6 user to **Preview** it.
12. This time, **Reassign** the page from the **Publish** drop-down menu.
13. **Reassign** the page to the Level 10 user.
14. Log out of the Level 8 user and log back in as the Level 10 user.
15. In **Dashboard > Workflow,** navigate to the page and **Decline** it.
16. Log out of the Level 10 user and back in as a Level 6 user.
17. Navigate to **Dashboard > Workflow** and observe that the declined page appears in the **Workflow** list view as declined.