

CMS Administrator Guide

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Overview

The Users Tab is where user information is entered, managed and permissions for access to the CMS are granted. Individuals requiring access to the CMS for managing content must be given a UserId and assigned a 'role' within the system. Individuals that do not require access to manage content, but are to be listed in the directory do not need a UserId.

There are four distinct roles and each role has varying degrees of permissions that control the user's ability to make changes to CMS content. Content management permissions can be modified after adding the user to the system and assigning page access. The administrator must complete page assignments for each user before the user can add/modify the page. The administrator can keep the default permissions based on the assigned role or they can add additional permissions.

The roles, in order from most to least access, are:

- Web Administrator
- Content Publisher
- Content Editor
- Staff Member

User Roles

Web Administrator

Important: Only a finite number of users should be assigned to the Web Administrator Role.

Web Administrators have full access to the entire system. They have the ability to add, edit, and delete all users on the CMS system. They have rights to change content of to all pages of the website and are able to publish those changes to the public. They can delete images and files, as well as add, edit and delete the categories under which these images and files are saved. They have the right to add, delete, and edit all calendars. They can add, edit and delete events from all calendars. They can also perform any change that is possible in any purchased module installed with your version of the CMS.

Content Publisher

Content Publishers have the ability to publish (to the public) changes that are made to web pages to which they have been assigned. Content Publishers receive the permission "Manage Assigned Pages" by default, which allows them, on the pages for which they have been assigned, to add, delete, move, hide and

unhide (“Show”) pages they are assigned. A Content Publisher must be granted permission to either all or specific pages before they are able to publish changes. The Content Publisher is notified via email when an assigned page has been modified by a Content Editor and is ready to be published.

Note: All Content Publishers must have an email address listed in their User – Update User Information page in order to receive ‘ready to publish’ notifications.

Content Editor

Content Editors can edit the content of their assigned pages. They rely on Content Publishers to publish their work so that the public can see their changes. A Content editor must be assigned to specific pages before they can make any changes to the page.

Staff Member

Staff members by default do not have any rights to the system. A Staff Member role is used so that the person appears in the staff directory. They are also able to log into the system in order to manage their personal profile and contact information.

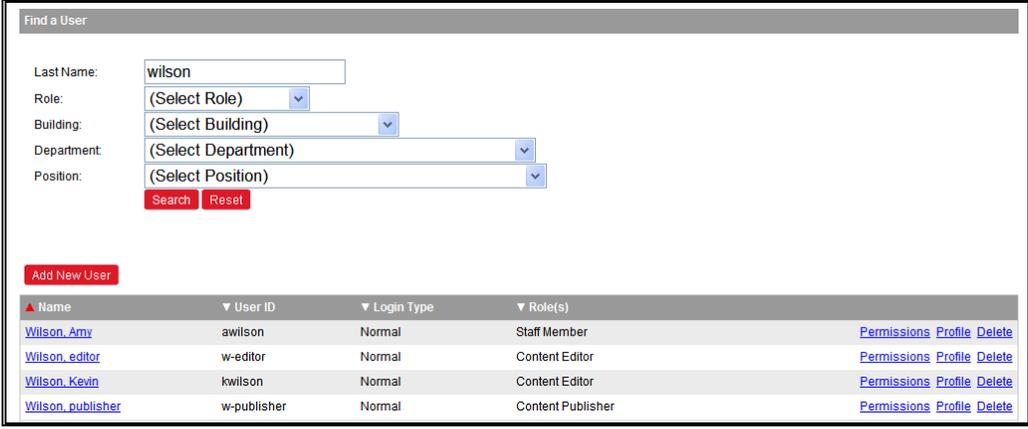
Note: It is recommended that any user allowed to manipulate page content be assigned the Content Editor Role and not Staff Member Role.

User Administration

Search for a User

You can search for an existing user and make changes to his or her role or permissions.

1. Click on the **Users** tab from the menu at the top of the screen.



Name	User ID	Login Type	Role(s)
Wilson, Amy	awilson	Normal	Staff Member
Wilson, editor	w-editor	Normal	Content Editor
Wilson, Kevin	kwilson	Normal	Content Editor
Wilson, publisher	w-publisher	Normal	Content Publisher

2. To search for the user, type in his or her last name in the **Last Name** field and click **Search**.
3. Scroll down the page until you find the user you are searching for. If the user is not listed on the page, you may have to click the 'forward arrow' at the bottom of the screen to move to an additional page.

Note: You can change the number of users displayed per page by selecting the drop down box to the right of the 'Users per Page' field at the bottom of the page.

Note: You may use a % as a wildcard in this field.

Add/Manage User Accounts

Note: You must be a Web Administrator in order to add a user.

There are only a few fields required to add a new user to the CMS; they are role, first name, and last name. However, there are many fields available to capture user demographics and some that are required when using certain features of the CMS.

1. Select the **Users** tab from the menu at the top of the screen.
2. Click the **Add New User** button. The **User – Update User Information** form appears.

The screenshot shows a web form for updating user information. It is organized into three main sections:

- Login Information:** Contains fields for Userid (awilson), Password (masked), Reenter Password (masked), Can Logon? (radio buttons for Yes/No, with Yes selected), and Display in Staff Directory? (radio buttons for Yes/No, with Yes selected).
- User Information:** Contains fields for First Name (Amy), Last Name (Wilson), Middle Name, Prefix, Suffix, Email, Office Phone, Extension, Fax, Address, City, State (dropdown), Zip Code, and Country.
- Staff Directory Groups:** Contains two columns: 'Unassigned Staff Groups' (with 'Administration' listed) and 'Assigned Staff Groups' (empty). A red 'Add All >>' button is located at the bottom center.

3. Type in a **unique** UserId.

Note: A UserId is only required if the user will be allowed access to the CMS. If you are adding an individual's personal demographics only to have them listed in the staff directory, you do not need to enter a UserId or Password.

4. Select a **Role** from the drop-down menu. For an explanation of the roles, see *User Roles* earlier in this manual.
5. **Type** in a **Password** and confirm it by typing in the same password in the **Reenter Password** field.
6. **Type** the **First and Last Name** of the user in the appropriate fields.
7. Change "**Can Logon**" default to **Yes**.

Note: If you do not want the user to be able to logon, change to No. If you select **No** for **Can Logon**, the user will not be able to logon to the system, even if they have a username and password.

8. Click **Save**.

Personal User Information

There are several fields available on the **Users - Update User Information** page that allows you to capture additional user demographics. The following fields are

informational only, not required, and are only displayed in a User's profile if configured to do so.

- Middle Name
- Prefix
- Suffix
- Fax
- Address
- City
- State
- Zip
- Country
- District

To change a User's personal information:

1. Click on the user's name to open the **User Editor** form.
2. Change or add personal information as necessary.
3. Make changes to the form and click **Save**.

Staff Directory

You can choose to display or not display any User's contact information in the Staff Directory. To display User information in the Staff Directory, you must change the "Display in Staff Directory" option on the Users-Update User Information page to **Yes** and enter the required information.

1. From the Users Tab, search for the user's name to open the **User - Update User Information** form.
2. Change "Display in Staff Directory" to **Yes**.
3. Add the **email address, phone number** and **extension**.

Note: If you do not select a building, department and position, the user will not be listed in the directory even though the option is set to Yes.

4. Assign one or more **buildings, departments, and positions**.

Note: If you do not select a building, department and position, the user will not be listed in the directory even though the option is set to Yes.

5. Click on **Save**.

Staff Directory Groups

The Staff Directory Groups option provides the ability to group Users together to display in 'mini-directories.'

Note: Staff Directory Groups must be added to the CMS using the configuration tab prior to adding users to the group.

1. Select the Users Tab.
2. **Search** for the User you want to add to the Directory Group.
3. Click on the user's name to open the **User – Update User Information** form.
4. **Select** the **Staff Group** from the Unassigned Staff Groups list to assign the user access.
5. Click on the **Add** button. The Group is added to the Assigned Staff Groups List.

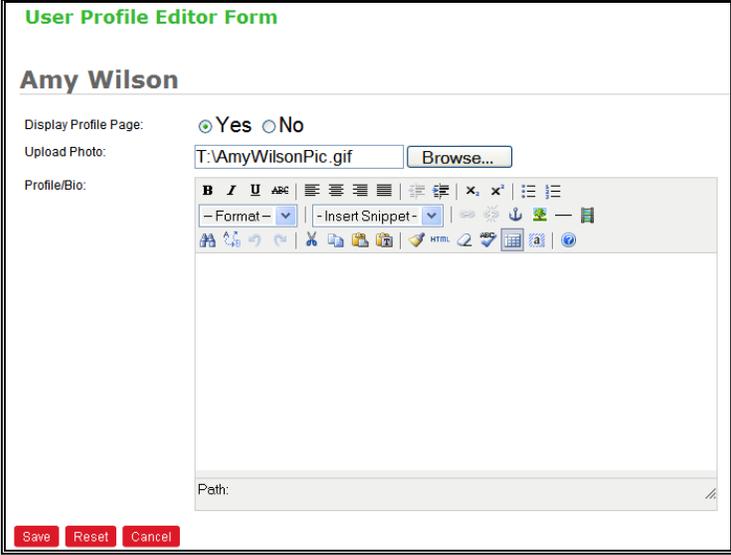
Note: To add the User to multiple groups, hold down the CTRL key and click on each group the User will be a member of. Click on the **Add All** button.

6. Click on **Save**.

User Profile

The User Profile provides the opportunity to document and display personal information and photos for each user. Any user assigned a UserId and Password can edit their personal profile page.

1. Click on the **Users** tab from the menu at the top of the screen. **Find** the user you are ready to add profile information for.
2. Click on the **Profile** link to the far right of the user's name. The **User Profile Editor Form** opens.



User Profile Editor Form

Amy Wilson

Display Profile Page: Yes No

Upload Photo: T:\AmyWilsonPic.gif

Profile/Bio:

Path: _____

3. Change “Display Profile Page” to **Yes**.
4. If you have a picture to associate with the UserId, select the **Browse** button to the right of the “Upload Photo” field. **Find and Select** the appropriate photo and click **Open**.
5. Enter “Profile/Bio” details in the Editor by entering it manually, or cutting and pasting from an existing document.
6. Click on **Save**.

Note: Changes to User Profiles are not viewable to the public until the page is published.

Standard CMS - Permissions and Assignments

All user roles, other than the Web Administrator, must be assigned access to specific pages in order to manipulate content. Prior to adding or modifying user permissions, it is important to understand the following terminology.

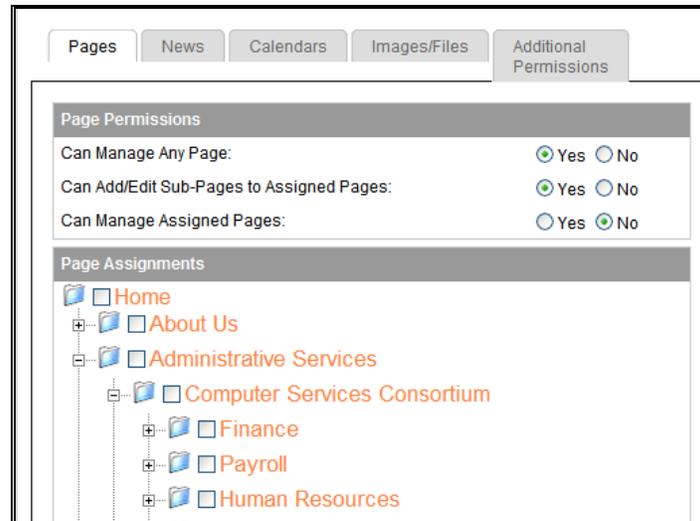
- *Page Assignments* – Allows the User the ability to edit or manage page content.
- *Can Manage* – Full Web Administrator rights to the module.
- *Publish* – Make available for public viewing/access.

Default Permissions Table

Default Permissions				
	Web Administrator	Content Publisher	Content Editor	Staff Member
Page Permissions				
Can Manage Any Page	Yes	No	Yes	No
Can Add/Edit Sub-Pages to Assigned Pages	Yes	Yes	No	Yes
Can Manage Assigned Pages	Yes	Yes	No	No
News Permissions				
Can Add and Delete News Sections	Yes	No	No	No
Can Manage All News Sections	Yes	No	No	No
Calendar Permissions				
Can Add and Delete News Sections	Yes	No	No	No
Can Manage All News Sections	Yes	No	No	No
Images/Files Permissions				
Can Manage Any File	Yes	No	No	No
Additional Permissions				
Can Manage Staff Directory	Yes	No	No	No
Can Manage Script Integration Modules	Yes	No	No	No

Page Permissions

All user roles, other than the Web Administrator, **must be assigned access to specific Pages** in order to manipulate content. In other words, if a Content Publisher is not 'assigned' a Page, they do not have access to that page and cannot make changes to the content.



- **Can Manage Any Page** – Grants the user permissions that allows full access to all pages in the website. They have the ability to add, edit, delete, move, hide, unhide (show) and publish any page on the website.
- **Can Add/Edit Sub-Pages to Assigned Pages** – Grants the user permissions to add and edit sub-pages for the specific pages they have been assigned or that they have created.

Note: A Content Editor will not be able to publish new pages unless the “Can Manage Assigned Pages” permission is also granted.

- **Can Manage Assigned Pages** - Grants the user full access to the pages for which they have been assigned. This includes the ability to add pages, edit, delete, move, hide, unhide (show), and publish assigned pages.

Page Assignments

1. Click on the **Users** tab from the menu at the top of the screen. **Find** the user you are ready to assign permissions.
2. Click on the **Permissions** link to the far right of the user’s name. The **User –Assign User Permissions** page opens.
3. **Find the page(s)** that you would like the user to be able to edit.

Note: You may need to click on the plus (+) signs to the left of the folder icon to expand the list of pages in the tree.

4. **Click on the checkbox** next to that page(s).

Note: You must place a check box in front of **each** page the user is to have access to.

5. Scroll to the bottom of the page and click **Save**.

News Permissions

All user roles, other than the Web Administrator, **must be assigned access to specific News Sections** in order to manipulate content. In other words, if a Content Publisher is not 'assigned' a News Section, they do not have access to and cannot make changes to the content.

The screenshot shows a web interface for managing news permissions. At the top, there are tabs for 'Pages', 'News', 'Calendars', 'Images/Files', and 'Additional Permissions'. The 'News' tab is active. Below the tabs is a section titled 'News Section Assignments'. It is divided into two columns: 'Available News Sections' and 'Selected News Sections'. The 'Available News Sections' column contains a list with a scroll bar: 'CS Finance', 'Home Page', 'permissions', and 'STv1.7.188News'. Between the columns are four red buttons: 'Add All >>', 'Add >', '< Remove', and '<< Remove All'. The 'Selected News Sections' column is currently empty. Below this is a section titled 'Additional News Section Permissions'. It contains two rows of radio button options: 'Can Add and Delete News Sections:' with 'Yes' and 'No' (selected), and 'Can Manage All News Sections:' with 'Yes' and 'No' (selected). At the bottom of the form are three red buttons: 'Save', 'Reset', and 'Cancel'.

- **Can Add and Delete News Sections** - Grants the user complete access to all aspects of the News Module
- **Can Manage All News Sections** - Grants the user full access to all news sections. This allows them to add and delete news articles to any news section.

News Assignments

1. Click on the **Users** tab from the menu at the top of the screen. **Find** the user you are ready to assign permissions.
2. Click on the **Permissions** link to the far right of the user's name. The **User –Assign User Permissions** page opens.
3. Click on the **News** tab.

4. **Select** the **News Section** from the Available News Sections list to assign the user access.
5. Click on the **Add** button. The News Section is added to the Selected News Section list.

Note: To add the User to multiple sections, hold down the CTRL key and click on each section the User should have access to. Click on the **Add All** button.

6. Click on **Save**.

Calendar Permissions

All user roles, other than the Web Administrator, **must be assigned access to specific Calendars** in order to manipulate content. In other words, if a Content Publisher is not 'assigned' a Calendar, they do not have access to and cannot make changes to the content.

The screenshot displays the 'Calendar Assignments' interface. At the top, there are navigation tabs: 'Pages', 'News', 'Calendars', 'Images/Files', and 'Additional Permissions'. The 'Calendars' tab is selected. Below the tabs, the interface is divided into two main sections. The first section, 'Calendar Assignments', contains two columns: 'Available Calendars' and 'Selected Calendars'. The 'Available Calendars' list includes 'Beginning Schoc', 'Board Meetings', 'Early On ICC Me', and 'Finance'. To the right of this list are four red buttons: 'Add All >>', 'Add >', '< Remove', and '<< Remove All'. The 'Selected Calendars' column is currently empty. The second section, 'Additional Calendar Permissions', contains two rows of radio button options. The first row is 'Can Add and Delete Calendars:' with 'Yes' and 'No' options, where 'No' is selected. The second row is 'Can Manage All Calendars:' with 'Yes' and 'No' options, where 'No' is selected. At the bottom of the interface are three red buttons: 'Save', 'Reset', and 'Cancel'.

- **Can Add/Delete Calendars** – Grants the user the ability to add and delete calendars. Users with this permission also can edit all calendars and, therefore, change who are Selected Editors of all calendars. Users with this right can view, edit, add and delete events to all calendars. They also have the “Show on All” option which allows them to add events to all calendars at one time.
- **Can Manage All Calendars** – Grants the user the ability to edit all calendars. Users can view, edit, add and delete **events** to all calendars.

They also have the “Show on All” option which allows them to add events to all calendars at one time.

Calendars Assignments

1. Click on the **Users** tab from the menu at the top of the screen. **Find** the user you are ready to assign permissions.
2. Click on the **Permissions** link to the far right of the user’s name. The **User –Assign User Permissions** page opens.
3. Click on the **Calendars** tab.
4. **Select** the **Calendar** from the Available Calendars list to assign the user access.
5. Click on the **Add** button. The calendar is added to the Selected Calendars list.

Note: To add the User to multiple calendars, hold down the CTRL key and click on each section the User should have access to. Click on the **Add All** button.

6. Click on **Save**.

Images/Files Permission

All user roles, other than the Web Administrator, **must be assigned access to specific Image Category** files in order to delete content. In other words, if a Content Publisher is not ‘assigned’ an Image Category, they do not have access to and cannot make changes to the content. However, all roles except for the Staff Member role have rights to **add** images.

The screenshot displays the 'Images/Files' tab within the 'Additional Permissions' section. It features a 'File Category Assignments' area with two columns: 'Available File Categories' and 'Selected File Categories'. The 'Available File Categories' list includes 'AAVideos', 'about us', 'atrc', and 'Bilingual'. Between the columns are buttons: 'Add All >>', 'Add >', '< Remove', and '<< Remove All'. The 'Selected File Categories' column is currently empty. Below this is the 'Images/Files Permissions' section with a radio button for 'Can Manage Any File:' set to 'No'. At the bottom are 'Save', 'Reset', and 'Cancel' buttons.

- **Can Manage Image Files** - Grants the user to ability to delete images and files uploaded to the website. It also allows the user to add, edit, and delete Categories in which the images and files are saved.

Images/Files Assignments

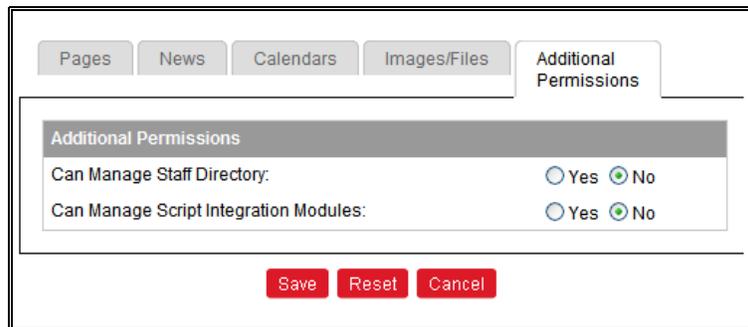
1. Click on the **Users** tab from the menu at the top of the screen. **Find** the user you are ready to assign permissions.
2. Click on the **Permissions** link to the far right of the user's name. The **User – Assign User Permissions** page opens.
3. Click on the **Images/Files** tab.
4. **Select** the **Category** from the Available File Categories list to assign the user access.
5. Click on the **Add** button. The category is added to the Selected File Categories list.

Note: To add the User to multiple categories, hold down the CTRL key and click on each category the User should have access to. Click on the **Add All** button.

6. Click on **Save**.

Additional Permissions – Standard CMS

Additional Permissions includes “Can Manage Staff Directory” and “Can Manage Script Integration Modules.” All user roles, other than the Web Administrator, **must be granted permissions** in order to manage content of the Staff Directory and/or Script Integration Modules.



The screenshot shows a web interface for configuring permissions. At the top, there are five tabs: Pages, News, Calendars, Images/Files, and Additional Permissions. The 'Additional Permissions' tab is selected. Below the tabs, there is a section titled 'Additional Permissions' with two rows of settings. The first row is 'Can Manage Staff Directory:' with radio buttons for 'Yes' and 'No', where 'No' is selected. The second row is 'Can Manage Script Integration Modules:' with radio buttons for 'Yes' and 'No', where 'No' is selected. At the bottom of the form, there are three buttons: 'Save', 'Reset', and 'Cancel'.

- **Can Manage Staff Directory** - Grants the user the ability to edit all user's personal information and profile page.
- **Can Manage Integration Modules** - Grants the user to ability to embed and edit Java scripts for integration into the CMS.

Manage Staff Directory

1. Click on the **Users** tab from the menu at the top of the screen and **Find** the user you are ready to assign directory permissions.
2. Click on the **Permissions** link to the far right of the user's name. The **User – Assign User Permissions** page opens.
3. Click on the **Additional Permissions** tab.
4. Change “Can Manage Staff Directory” to **Yes**.
5. Click on **Save**.

Manage Script Integration Modules

CAUTION: Only a Web Administrator should be assigned to the Manage Script Integration Module as this can literally destroy a web page if not used correctly.

1. Click on the **Users** tab from the menu at the top of the screen and **Find** the user you are ready to assign directory permissions.
2. Click on the **Permissions** link to the far right of the user's name. The **User – Assign User Permissions** page opens.
3. Click on the **Additional Permissions** tab.
4. Change “Can Manage Integration Scripts” to **Yes**.
5. Click on **Save**.

Purchased Modules - Permissions and Assignments

There are additional modules available, if purchased, that you can add to enhance the functionality of the CMS. If your site has purchased any of the non-standard CMS modules, you will find the permissions settings for those modules included in their respective User Guides.