Web CMS Sub Administrator Training

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Introduction

This training guide will take you through user and workflow administration in the web CMS. To help illustrate the processes covered here, throughout the guide you will find links to video clips, denoted by the icon. You will have been sent details of a test user that you can use in the training exercises, but if you have colleagues you need to set up as web CMS users you might like to use their usernames instead.

User Administration

User Roles

The differing User Roles determine what options a user has for accessing secure areas of the website or Activedition, and the scope of any site management features available.

Administrator

The Administrator role offers automatic access to any secure areas of the site, and full access to all of the management facilities available in Activedition. Administrators have the ability to edit, delete and publish content in all Site Areas, are able to manage items in any Library, can manage Users, Mailing lists and all other features.

Sub Administrator

The Sub Administrators role offers a sub set of the management facilities available to full administrators. Unlike full administrators, sub administrators can access only the areas and libraries to which they have been granted access. The role allows staff within academic and service departments to perform user administration for their sites and to set up work flow processes, if they wish, to allow editorial control in their sites.

Content Contributor

The Content Contributor has access to a limited number of management tools in Activedition; by default the minimum authorisations for these are set, allowing (Sub) Administrators to assign them management facilities on a site restricted basis as appropriate. Content Contributors do not have automatic access to secure areas of the live website and must have it specifically granted.

This role is intended for those updating and creating content only and, as such, only content related facilities are available with no access to administration, configuration or most of the reporting features.

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Site User

A Site User cannot access Activedition to manage content. This role is intended for clients accessing secure areas of the published website. The secure areas that Site Users can access must be specifically set by an Administrator or Sub Administrator.

Overview of User Management

Activedition supports the creation of complex user structures through the User Manager. Once created, users and groups can be authorised to access and edit different areas of the web site. Content Contributors and content contributor groups can also have update authorisations set for Menu, Form, File and Multimedia libraries.

We recommend that you grant users access to your site by first creating a group with authorisations to edit your site and then adding users to that group – the users will then inherit that group's authorisations. This is a much faster way of giving several users the same set of permissions than setting the permission for each individual.

Sub administrators can make other sub administrators and grant them privileges up to those they themselves have.

All University of Reading members are loaded into the CMS database – the user list is updated daily. If you require external users you should apply for external usernames, which will also require VPN accounts; please refer to the ITS web site for further information.

There are two types of user group

• Primary Group
This is a top level group and can contain Secondary Groups and individual users as members.

• Secondary Group
This can only contain individual users as members, and can be a member of one or more Primary Groups

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Authorisations and the User Type set for a group are inherited by all members of that group.

Higher Permissions will only have priority e.g.:

• A Site User is the member of a Content Contributor group. In this case the site user will have the ability to edit content on the site as authorised in the group and in their personal authorisations.

• A Content Contributor is the member of a Site User group. In this case the Content Contributor will retain their delete, update and publish authorisations, they will not be limited by the Site Users restrictions, although they may have access to additional secure areas in the published site through the Site Users group.
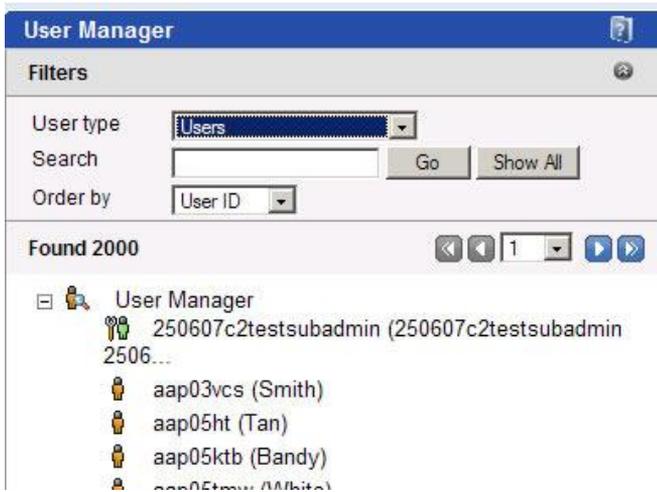
The User Manager

The User manager is central to user management, it is from here that you will access users and groups and set their roles and permissions.


To open the user manger, click on the Users icon in the Administration group, or click on Administration in the menu across the top of the CMS window and then click on the Users link in the set of links which then appear below the main menu.

The user manager window will then open. When first opened the user manger will list all the users in the CMS, but you can search for a particular user or group. The User type drop down list determines what you are searching for; an individual user, secondary group or primary group. You can search by either ID or name. In the case of users, the ID is the University username of the individual. Currently only a small minority of users have their first name in their CMS user accounts and so if you are searching by name it is best to use surnames.

Contact its-help@reading.ac.uk for help with working as a sub administrator

Making a User a Content Contributor

- In the User Manager, search for a user using their ID or surname.
- Right click on the user you wish to promote to contributor status and then select properties
- Click the 'Content Contributor' Authorisation Level option.

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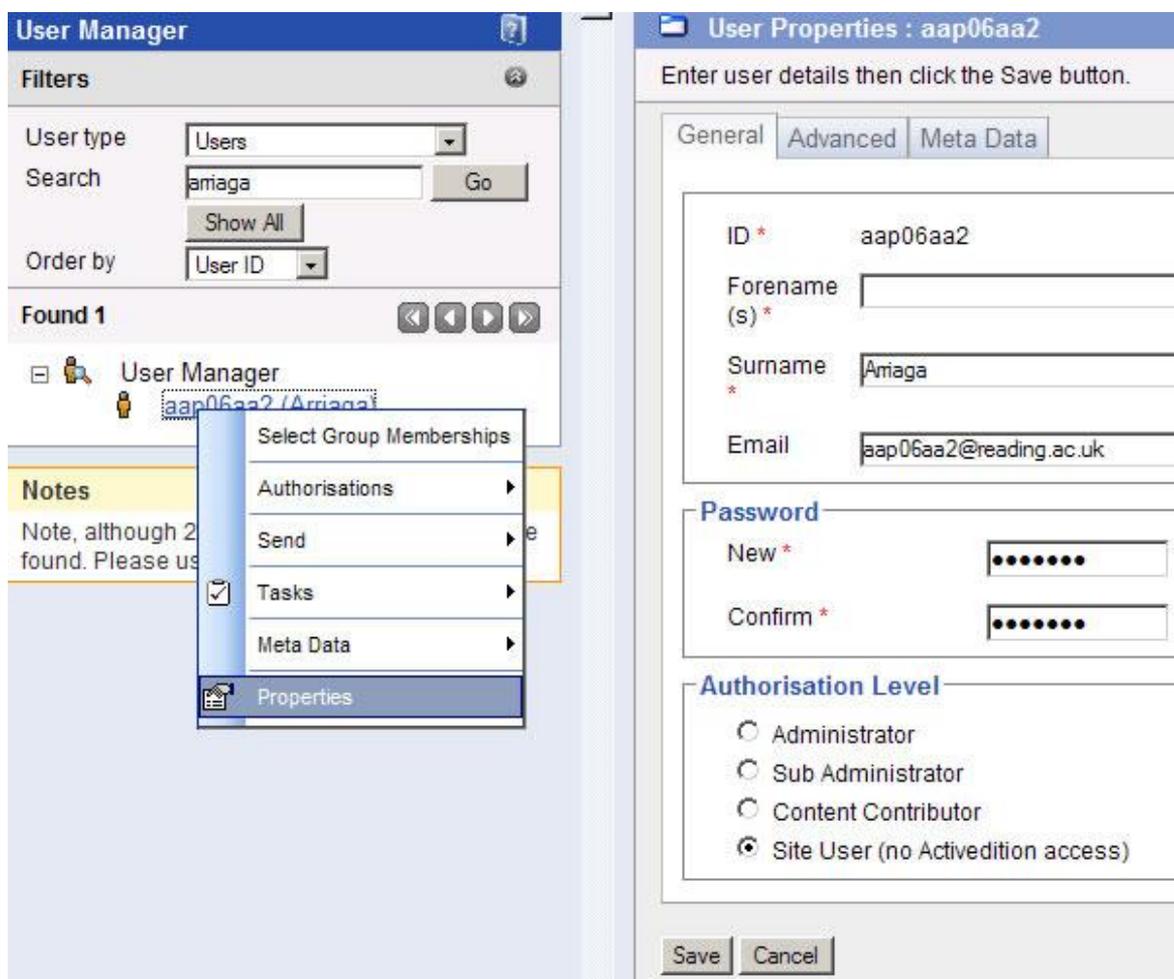
 [Making a user a content contributor](http://www.reading.ac.uk/internal/its/forms/subadmin/making_contributor.htm)
(http://www.reading.ac.uk/internal/its/forms/subadmin/making_contributor.htm)
Creating Groups

The process for either creating Primary or Secondary groups is as follows:
• Right mouse click on User Manager at the top of the tree view, mouse over
Add and select either Primary or Secondary Group.
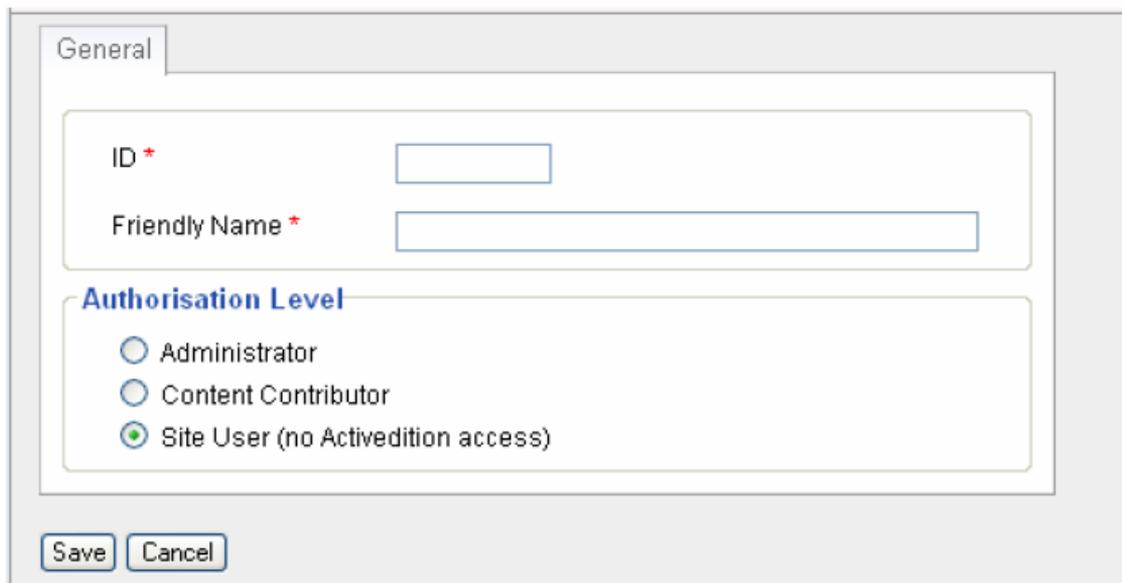
• Enter a name in the ID field. The ID field is the main group name that will appear in the user and group list. This cannot be edited once the group has been created. **NB all the groups you create must have an ID starting 'wg_'.**
• Enter a name in the Friendly Name field. This is a descriptive name for the group that will appear in brackets after the GroupID in the User Manager list.
• In the Authorisation Level section select one of the three available options and click on save.
To change user details right mouse click onto the Group name and select Properties.
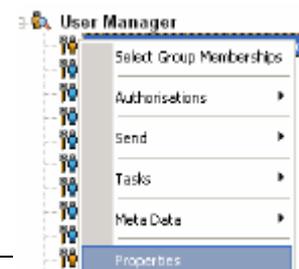
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Once created, user and group members / memberships can be managed by right clicking on the group name in the user manager and then choosing Select followed by the Group Members or Group Memberships option in the pop up menu.

After clicking on the group members or group memberships option, click on the Add button as shown below.
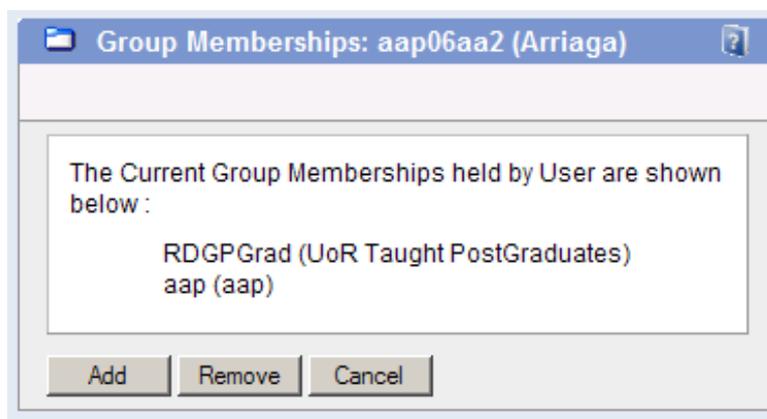
Adding a User to a Group

You will then be able to browse or search by name to select a user to add to the group.
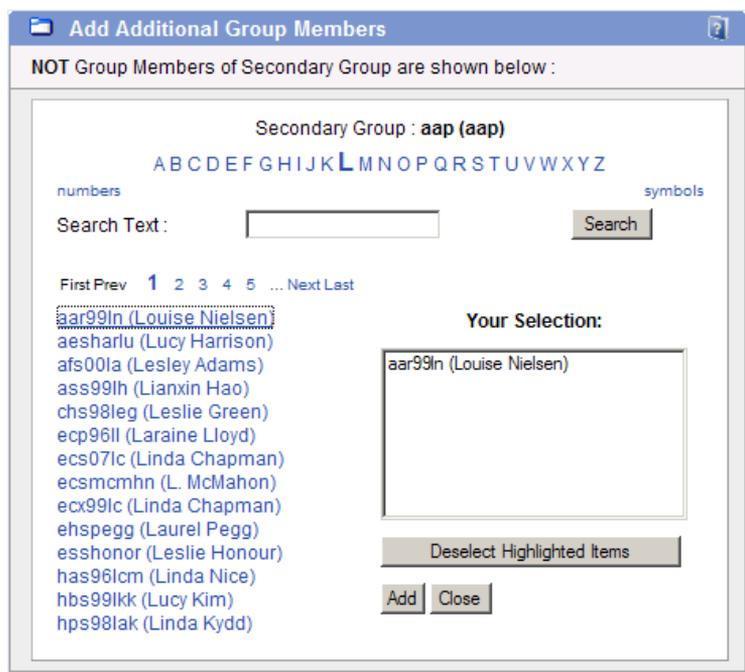
Click on a user in the list to the left to select for addition to the group. You can search for and select any number of users before clicking on Add button to add all the selected users to the group.

🖥 Creating a contributor group

(http://www.reading.ac.uk/internal/its/forms/subadmin/create_group.htm)

🖥 Adding users to a group

(http://www.reading.ac.uk/internal/its/forms/subadmin/add_group_member.htm)

**To Find Out Which Groups/Users Have Access to a Website**

1 In the Area Manager, locate the top level folder where you want to give someone access
2 Right-click on it, select Tasks and then User Authorisations
3 The right-hand side of the screen will display the groups/users that have different levels of access to the site
4 Make a note of the groups with access to this area (the text in brackets)

If there are multiple groups with access to the site, you may need to check which of these groups you have access to:

1   In the User Manager (open through Administration and Users), search for yourself either by surname or username
2   Right click on your user and choose Select Group Memberships
3   A list of groups you belong to will appear on the right-hand side of the screen

Content Contributor User and Content Contributor Group Authorisations

The Content Contributor role alone will not give users access to any areas or libraries. To set authorisation for a user or group, open the user manager and search for the user or group you wish to set authorisations for, right click on the user name, and then mouse over Authorisations.
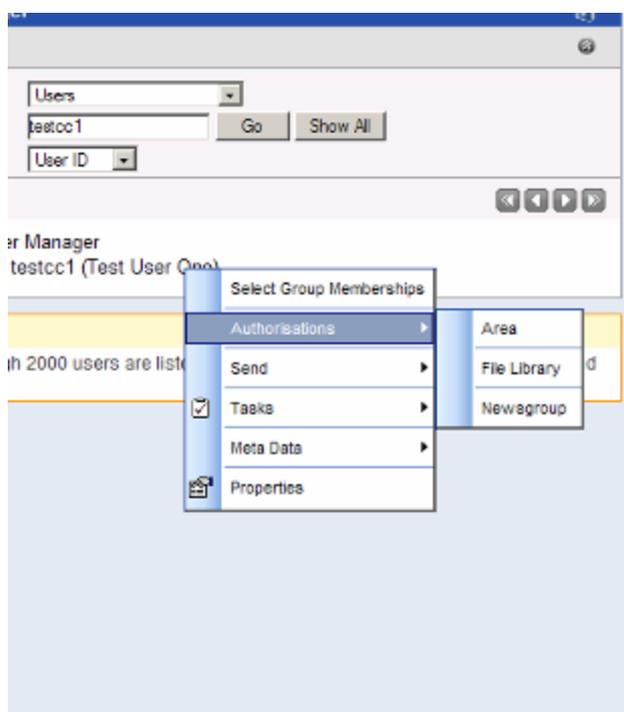
You will then see the different types of possible authorisations listed; click on one of these to set that type of authorisation.

Area Authorisations

Content Contributors can be authorised to Delete, Update Read and Publish Areas and pages within areas. Content contributors will only see the Areas they are authorised to edit in the Area Manager. When you click on the Area from the menu of authorisations the Site Authorisations list will appear. This will list all the areas in the CMS, but only those areas for which you have authorisations will the check boxes to set authorisations be enabled. We recommend you think carefully about granting Delete authorisation on any areas because if an area or page is deleted in error it will be very difficult to retrieve. It may be better to set up an 'archive' area and instruct contributors to move redundant pages and areas there in the first instance. Granting authorisation to an area will **not** extend authorisations to its sub areas – you will need to set authorisations for each sub area explicitly by ticking all of the relevant check boxes.

Once have you have ticked the appropriate set of check boxes, scroll down to the bottom of the Site Authorisations list and click on the Update Authorisations button.

[Setting area authorisations](http://www.reading.ac.uk/internal/its/forms/subadmin/set-areas.htm) (http://www.reading.ac.uk/internal/its/forms/subadmin/set-areas.htm)

Library Permissions

All libraries have at least two types of authorisation: Update and Read. Read authorisations allow the content contributor to use items in that library in pages. The meaning of Update permission varies according to the type of library.
• Template Library
It is **very important** that you set template library authorisations correctly, otherwise the contributor will encounter an error when they attempt to open a page in the CMS. You will find that you have only read authorisations, on the 'school' template library and the template library for your site. You **must** grant read authorisation for these libraries to your contributors.

[Setting Template Library Authorisations](http://www.reading.ac.uk/internal/its/forms/subadmin/settemplates.htm)
(http://www.reading.ac.uk/internal/its/forms/subadmin/settemplates.htm)

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• File Library

Update and Search authorisations can be set. Content Contributors will only be able to upload new and replacement files to libraries they are authorised to update. The Search authorisation is not relevant, it relates to the site search that can be used in the published site but this is not used by the University of Reading.

• Multimedia Library

Update rights can be set on Libraries in a similar way to file libraries. Content Contributors will only be able to upload new and replacement multimedia items to libraries they are authorised to update.

• Section Library

Update rights can be set on Section Libraries, allowing the Content Contributor to edit and create Sections.

• Form Library

Update rights can be set on Form Libraries, allowing the creation and editing of forms in the authorised library.

• Menu Library

Update rights can be set on Menu Libraries, allowing the creation and editing of menus in the authorised library.

• Tag Library

Update rights can be set on tag Libraries, allowing the creation and editing of tags in the authorised library.

Contact its-help@reading.ac.uk for help with working as a sub administrator

Creating Sub Administrators

Sub administrators are created in the same way as content contributors, but in this case you should select the 'Sub Administrator' Authorisation Level option. As with Content Contributors you will need to set appropriate area and library authorisations. Once the user has the sub administrator role you can then set which administrative functions the user has. To do this right click on a user in the user manager, mouse over Tasks and then click on User Options. You will see that by default that the user has access to only the user manager; if you wish to allow the user to also add and modify notification lists you should tick the Notification Manager checkbox.
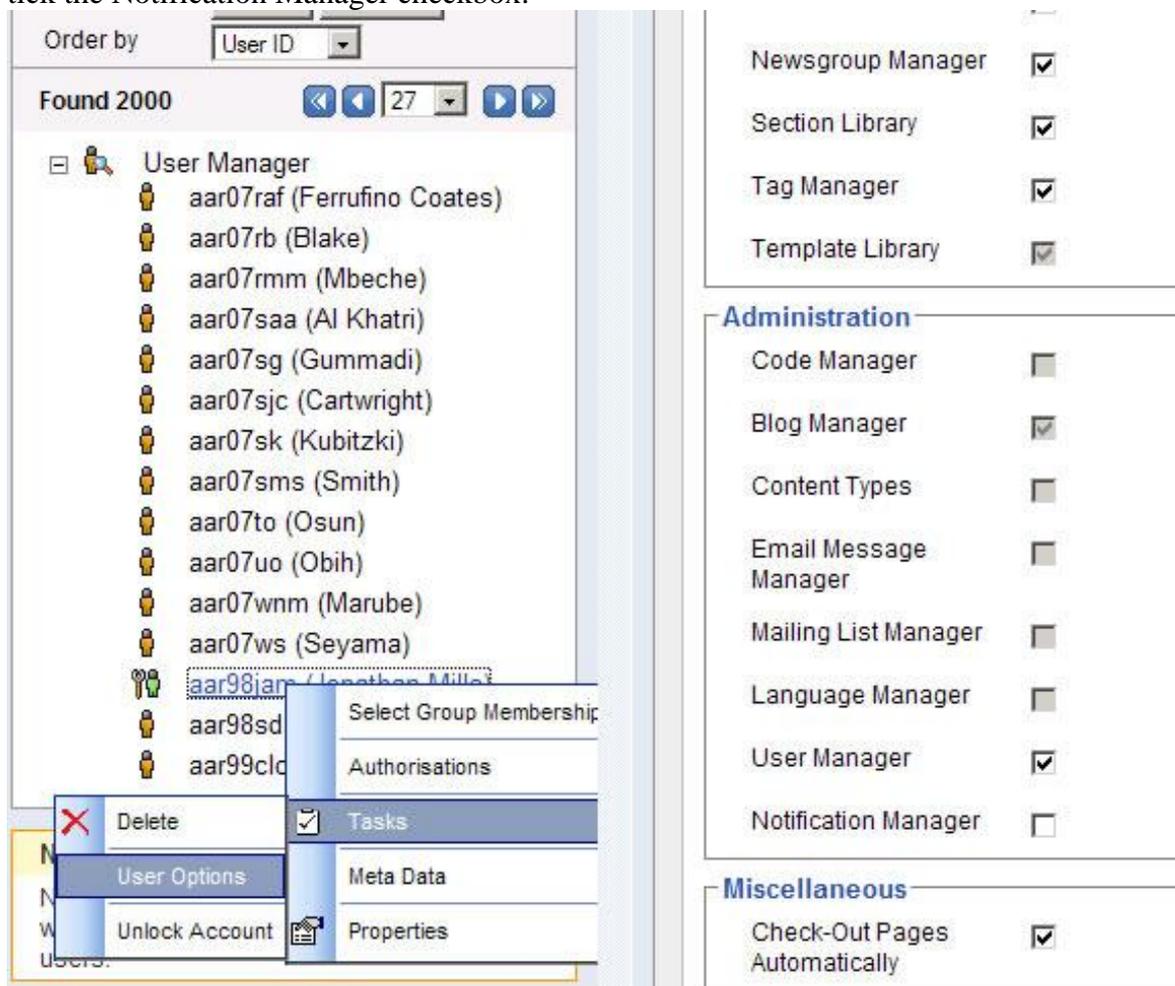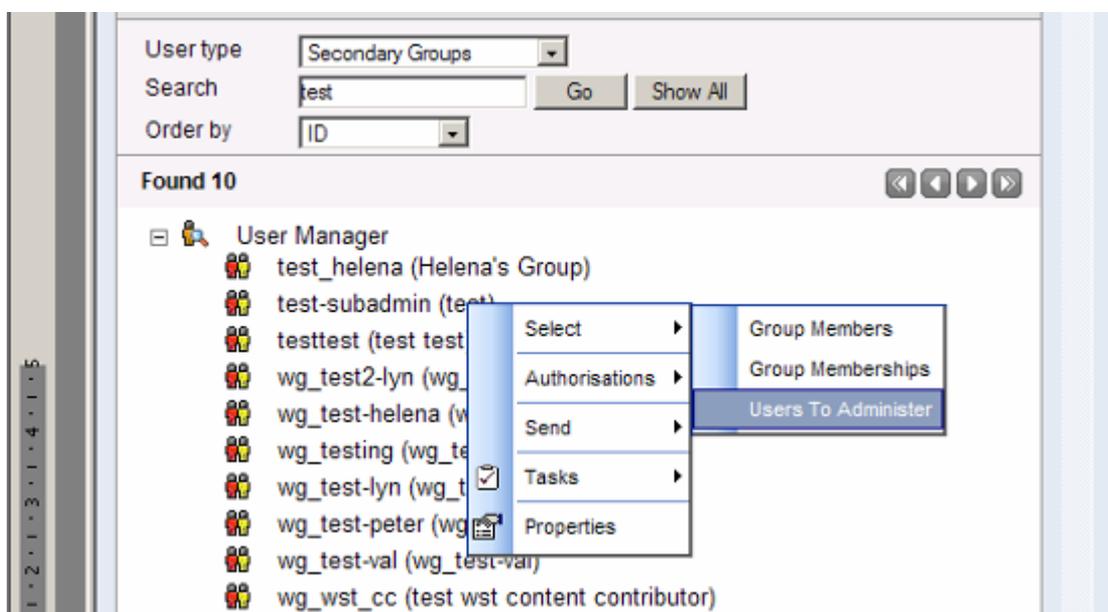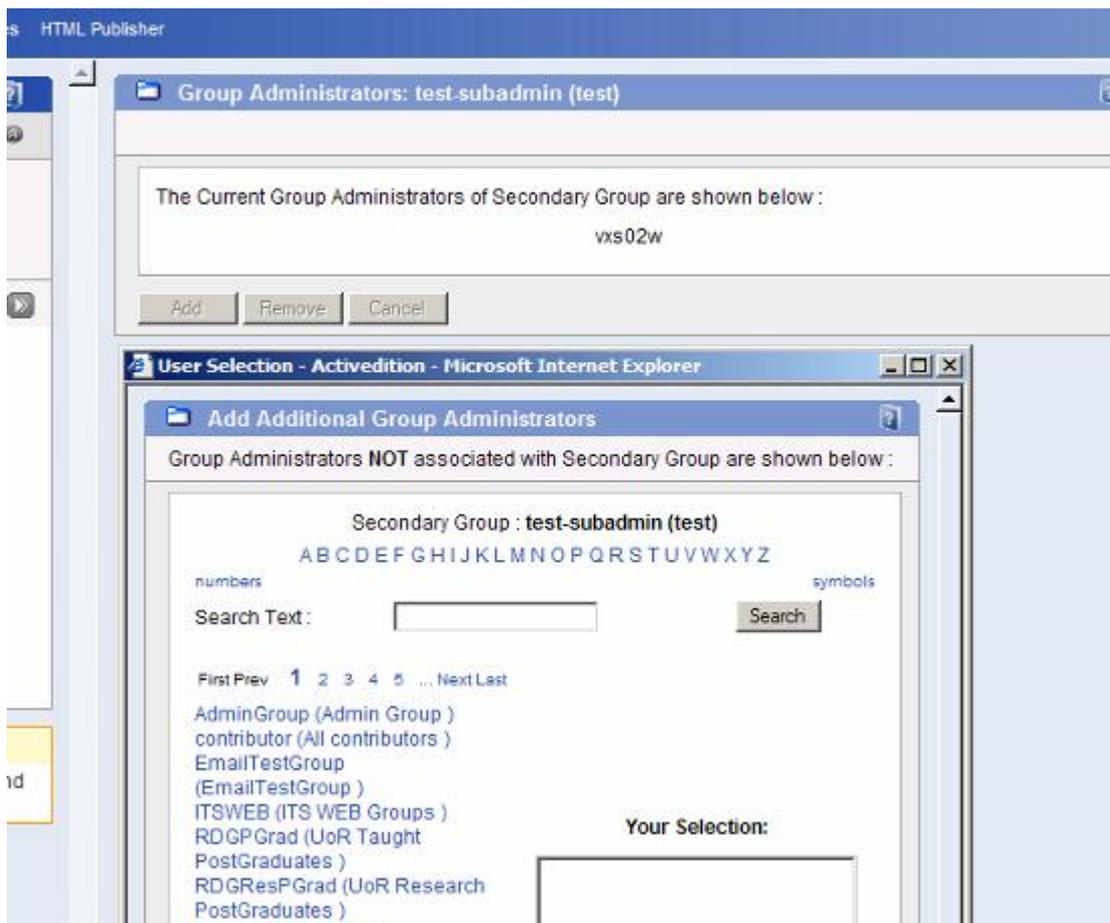
There is one further operation to perform: sub administrators are not able to administer any groups unless they have created that group or are given the right to administer the group. To do this:

- Find the group using the user manager
- Right click on the group ID, mouse over select and then click on 'users to administer'

In the next screen click on the 'Add' Button and then search for the user you wish to administer this group:

🖥 [Creating a sub administrator](http://www.reading.ac.uk/internal/its/forms/subadmin/createsubadmin.htm)
(http://www.reading.ac.uk/internal/its/forms/subadmin/createsubadmin.htm)

🖥 [Setting a sub administrator to administer a group](http://www.reading.ac.uk/internal/its/forms/subadmin/giveadmingroup.htm)
(http://www.reading.ac.uk/internal/its/forms/subadmin/giveadmingroup.htm)

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Exercise: User Management

Creating groups and users with access to site areas
• Create a new Content Contributor secondary group wg_myname_cc and set
Authorisations, where 'myname' is a name of your choice:
    o Update for one of your site's areas.
    o Update and read for your site's libraries.
• Add a test user to this group, making them a content contributor first.
• Logout of Activedition and login as the test user: note the differences.

Granting access to secure areas

Secure areas, once published, will require visitors to the web site to login. If you require a secure area you should contact its-help@reading.ac.uk to have this set up. Please note that secure areas should be used only if absolutely necessary e.g. for commercially sensitive information or for security reasons.

Access to secure areas is done via the user manager as one would normally set area authorisations. You will see that the 'Read Column' will contain check boxes for secure areas. Ticking this box will allow access to the published area for the group for which site authorisations are being set. To make it easier to set permissions on secure areas, a set of site user primary groups has been created for this purpose. There are several large groups, as follows:

- Domain_users: all University of Reading members
- RDGStaff: all University of Reading staff
- RDGPGrad: Taught Postgraduates
- RDGResPGrad: Research Postgraduates

There are also a series of smaller secondary groups for each department, one for each category of user:
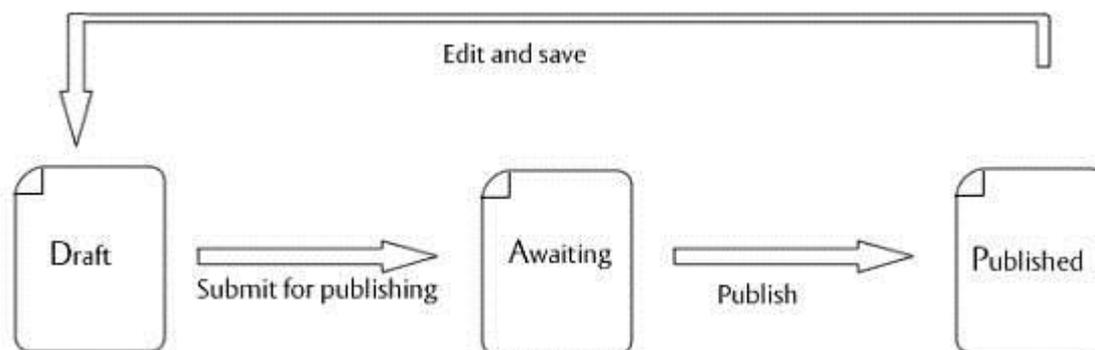
- Staff

- Postgraduate Research Students
- Postgraduate Taught Students
- Undergraduate Students
- External Usernames

These groups have three letter IDs. Each letter has a distinct meaning- the first indicates the faculty of directorate, the second indicates the department and the third indicates the status of the user (staff, student etc).
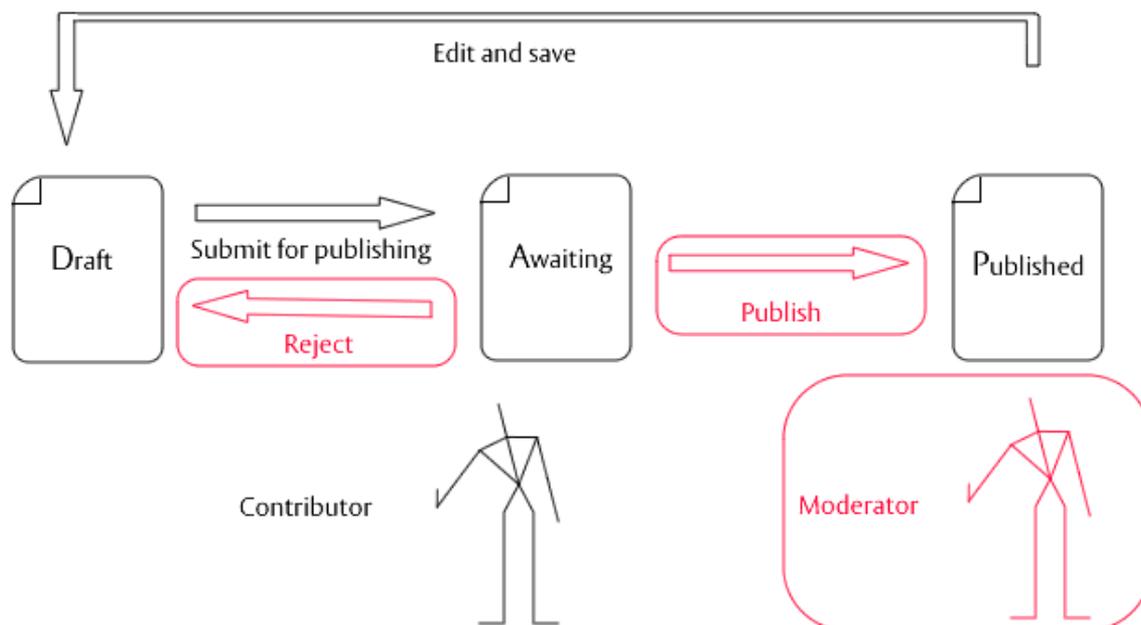
Notification lists

Notification Lists allow any user or group of users to be notified when the status of the whole site, one or more areas, or one or more specific pages (in a single area) changes to any one of the statuses present in the workflow (i.e. Draft, Awaiting Publishing, Published).

Common uses for this are to inform publishers with editorial control when a page is ready for their approval and publishing, or when managers or other staff need to be informed when content on the live site has been updated.

A typical workflow scenario

In the workflow scenario above the contributor is given update authorisation to an area or areas, but not publish authorisation. Instead, once the contributor submits a page for publishing, the moderator receives a notification containing a link to a report in the CMS from which, as the moderator, they will have the power to reject or publish pages submitted for publishing.

Setting up your moderator

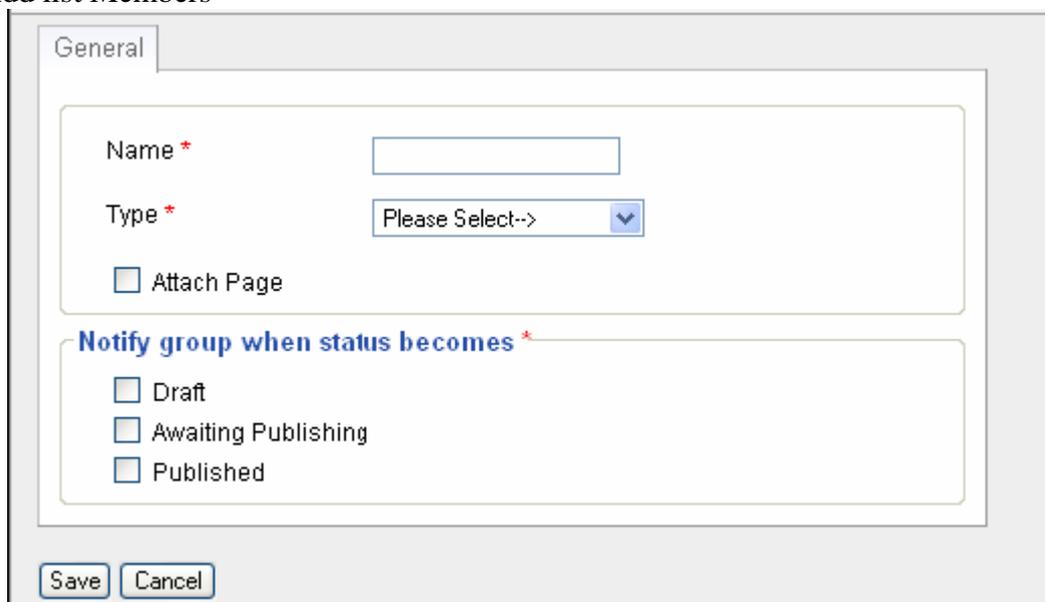There are three key points to setting up a user to be the moderator:

1. The user must have at least the content contributor role.
2. The user must have publish authorisations for the areas for which the user will act as moderator.
3. The user must have read access to the school template library and the template library for your site.

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If the moderator will only approve pages submitted for publishing and not edit any pages, this is all the moderator user will require. If, however, you wish the moderator to be able to make page edits you should set the appropriate area and library authorisations.

Creating Notification Lists

Notification List creation is a 4 step process:
1. Add List and Edit Properties
2. Select Message
3. Associate List
4. Add list Members

Step One - Edit Properties

Click on the Notification Lists icon in the Administration group to open the Notification List Manager. Right click on 'Notification List Manager' and choose the Add

Notification List option from the pop up menu and you will be prompted to setup the basic properties:

• Name

This is the Name of the list as will be displayed in Activedition.

• Type

This determines the nature of the Notification, Email, entry in the Activedition task list or both.

Options are: Email, Add Entry To Task List, and Email & Task.

• Attach Page

If the selected type includes an email notification the page can be attached to the email sent. In practice though, the attached page lacks any formatting and we do not recommend using this option.

• Notify group when status becomes …

These options determine when Notification Lists are sent out. When a page within the Associated List content changes status and the status is included in the rules, a notification is sent out.

Options are: Draft, Awaiting Publishing, and Published.

Once the notification list has been added, you will be able to edit these fields by choosing the Properties option on the menu for that Notification List.
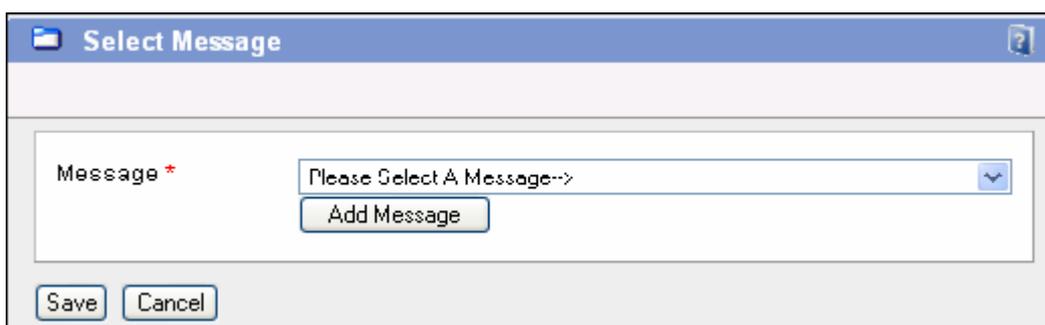

Step Two - Select Message

Save this form and you will be prompted to choose the message that is sent out with this

notification, this could be something like 'Please Review and Publish'. You will be bale to create your own message at this point, but we recommend you use the corp-waiting, corp-backtodraft,and corp-published messages already set up .

Once the Notification List has been created the message can be edited by choosing the Tasks->Edit Message menu option for that Notification List.

Step Three - Associate List

When the message has been saved you are prompted to choose which parts of the site trigger a notification when pages change status as specified in the first step.
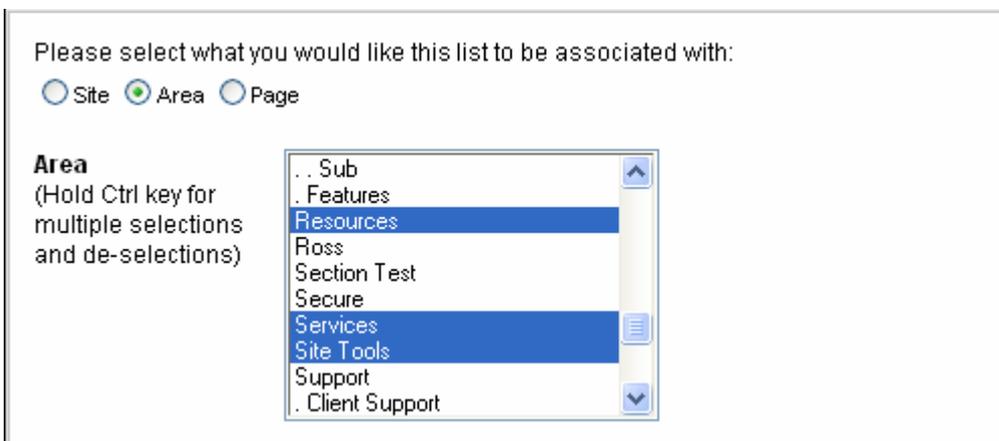
1. Choose whether the list is to be associated with the site, areas or pages.
2. If associated with areas, choose one or more areas from the list; if associated with pages, choose an area and then one or more pages from the list.
3. Save.

Once the Notification List has been created, the message can be edited by choosing the Tasks ->Associate List menu option for that Notification List.

Step Four - Add List Members

This allows you to add members to the notification list. This is done in a similar manner to adding users to a group. Each of the users, and users in a group that has been added, will be notified when an appropriate page moves to the specified status.
Click on the Add button to start the process of adding list members:
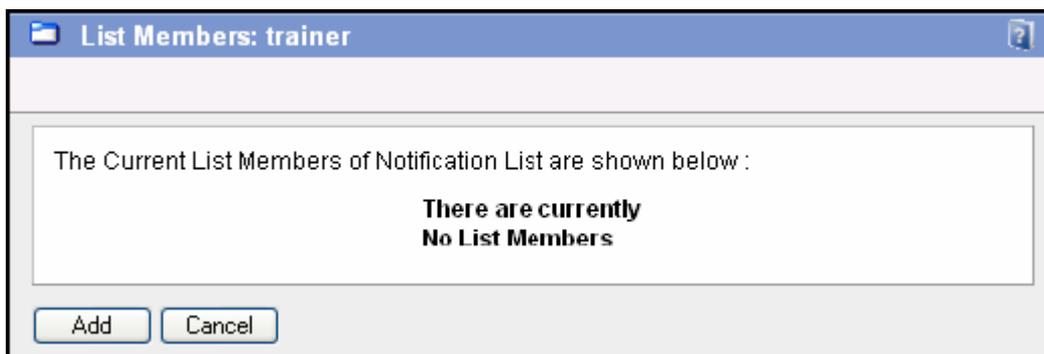
This will bring up the Add Additional List Members window where you can search or browse for users or groups to add to the notification list.
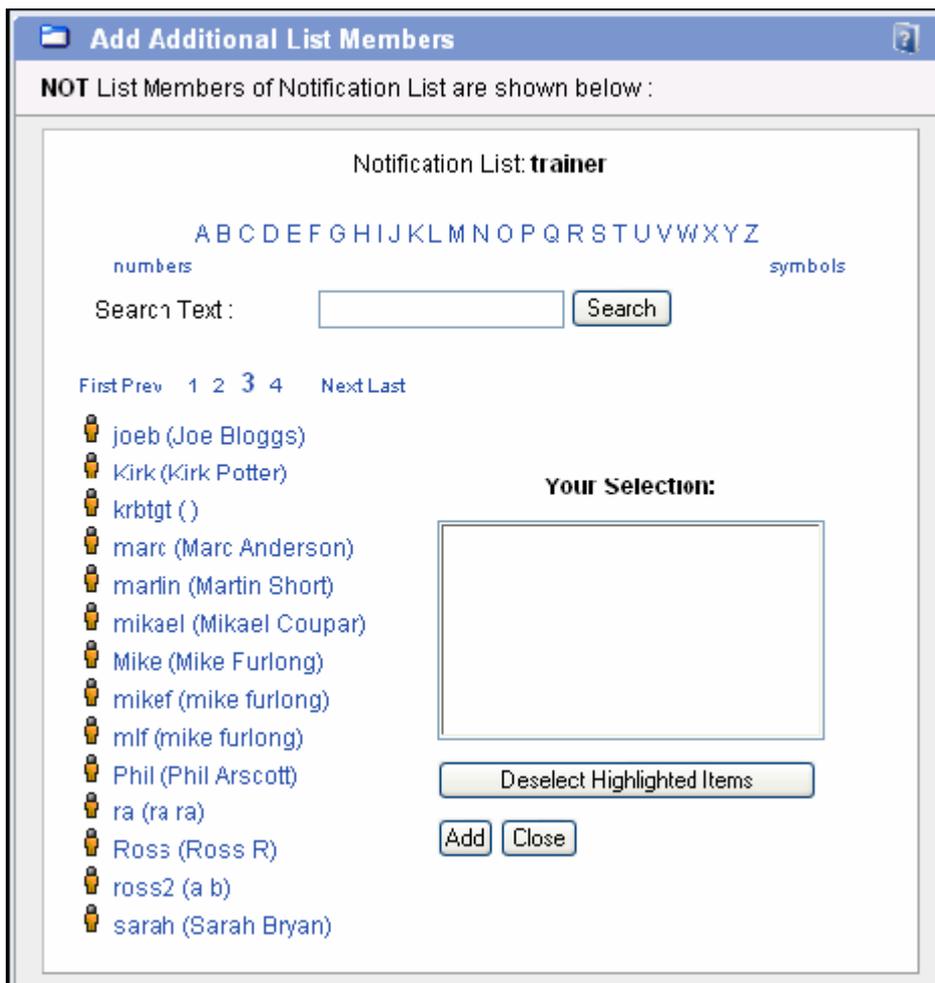
Once all the appropriate members have been added, click the Add button to complete the Notification List creation process. The new Notification List will now be added to the list on the left.

In a typical workflow scenario three notification lists would be required, each associated with the same area(s) for which workflow is required:

1. A list that is triggered when pages go to the 'Awaiting Publishing' status, for which the moderator is the list member – this will alert the moderator once a page is submitted for publishing.
2. A list that is triggered when pages go to the 'Draft' status, for which the content contributor or content contributor group is the list member – this will alert the contributors once a page is rejected by the moderator.
3. A list that is triggered when pages go to the 'Published' status, for which the content contributor or content contributor group is the list member – this will alert the contributors once a page is published by the moderator.

Creating a notification list for when pages are rejected by the moderator
(http://www.reading.ac.uk/internal/its/forms/subadmin/setup-list.htm)

The Moderator in action: the workflow report

When a page is submitted for publishing, the moderator will receive a link to the workflow report, which will list the pages awaiting publishing. If notification has been set up so that the moderator receives an email rather than having a task set, after clicking on the link to the CMS in the email the moderator will need to login to the CMS using the Auto Log In Button before the workflow report appears.
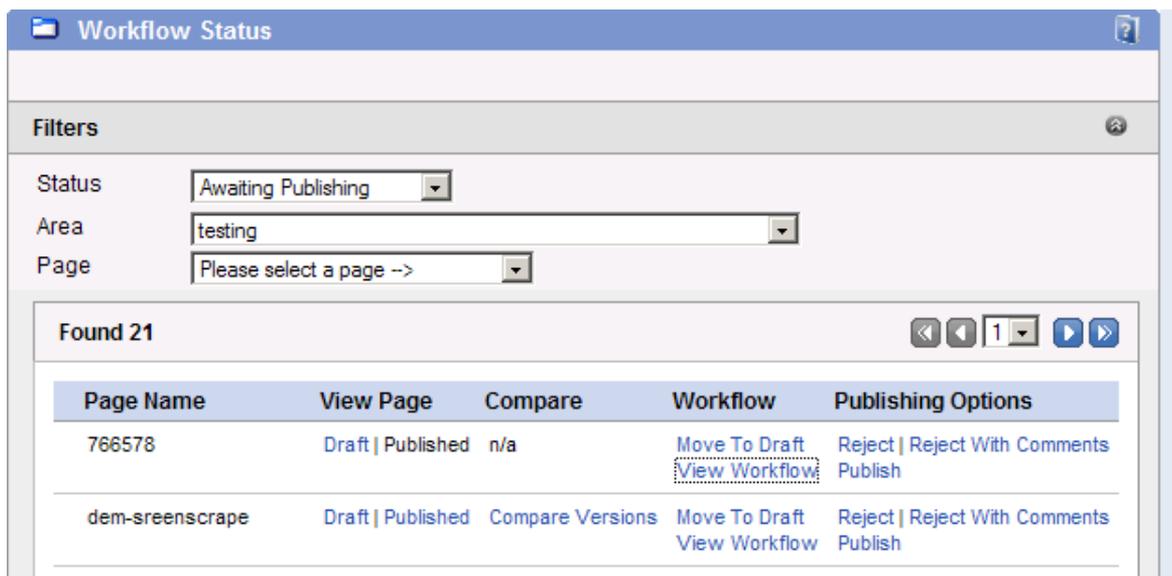
Using the Draft and Published links in the View Page column, the moderator can view the page awaiting publishing in the CMS and the previously published version, if one exists. If the page has been published previously there is a Compare Versions link – this will show the page awaiting publishing alongside the previously published version.

Having viewed the page awaiting publication, the moderator can then use the links in the Publishing Options column to decide the fate of the page. Using Reject, the page will be set back to draft status, triggering a notification to the content contributor(s) in our example workflow scenario. Using Reject With Comments has the same effect, but the comments entered by the moderator are included in the notification sent to content contributors. The Publish link allows the moderator to publish the page.

Overview of the workflow report
(http://www.reading.ac.uk/internal/its/forms/subadmin/workflow-report.htm)

Exercise: Notification Lists
• Create a new Notification List myname_awaiting – where 'myname' is a name of your own choice.

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- o Awaiting Publishing / email list only
- o Select the corp-awaiting message
- o Associate with an area in your site
- o Add yourself
- Create a new Notification List myname_todraft.
  - o Draft / task only
  - o Select the corp-backtodraft message
  - o Associate with the same area as used in your first notification list
  - o Add your test contributor
- Create a new Notification List myname_published.
  - o published / task only
  - o Select the corp-published message.
  - o Associate with the same area as used in your first notification list
  - o Add the same contributor as before

- Log in as a the test contributor
  - o Edit a page
  - o Submit it for publishing with Comments
  - o Logout

- Open your email
  - o Open the notification email
  - o Go to the CMS link in the email
  - o Look at the live/draft comparison
  - o Reject the page with comments

- Login to Activedition as the contributor again
- Note the new task

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