

Creating a user, policy groups, security groups and permissions

Scenario

We are dealing with a large organisation: Orange City Council, with many staff members, each needing access to their own area of the site tree. With each area, some staff members are content contributors, and others are publishers.

Our example: <http://www.orange.nsw.gov.au/>

We have an area in the site called "Visit & Experience" and a user needing access with a login to edit only that area.

Kate from the Visit & Experience Department needs access to the "Visit & Experience" branch in the website so she can add and edit content, and then tag it for approval from Jason, her department's publisher. We need to set Kate up as a content "contributor", but give her permission to work only in the Visit & Experience branch of the website.

To help explain, FarCry already comes with Policy Groups (to allow you "permission" or access to do certain tasks and in certain parts of the application) and External Security groups (to allow you into the application in the first place).

The Policy Groups FarCry already has:

Anonymous - Default user group

Contributors - People that can create content.

Member - People that can view content.

Publishers - People that can approve and create content.

SiteAdmin - People who can do anything but delete objects.

SysAdmin - People who can do anything.

The above groups allow you to allocate some staff access to do certain tasks to all parts of the tree.

The Security Groups FarCry already has:

Contributors - can create, edit, view and request approval only

Member - can view only

News Contributor - can create, edit, view and request approval of a news item only

Publishers - can approve, approve own content, container management, create, delete, edit, request approval and view.

SiteAdmin - has the ability to do everything

SysAdmin - has the ability to do everything

Note: - you can map the groups so that members of for example, the News Contributor External / Security group have the permissions of for example, Contributors as allocated within the Policy Group.

Just to recap: Kate needs to be a part of the "Visit & Experience" Policy Group, which we can then set to have permission to only the "Visit & Experience" Branch and deny permission to edit any other sections of the tree. To do this, we follow the following steps:



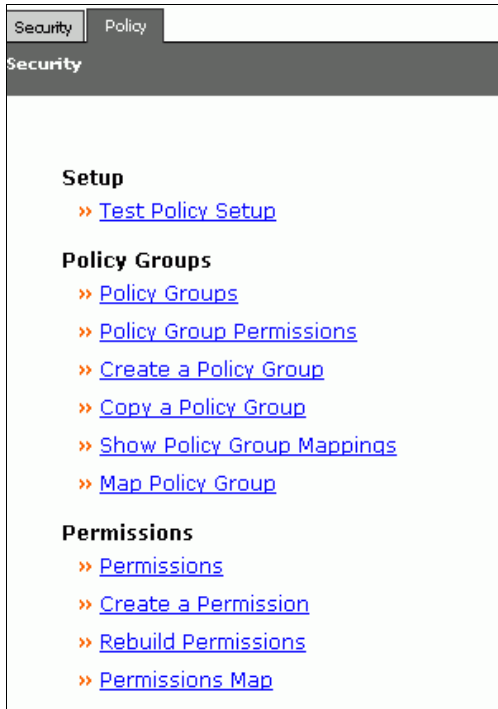
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Creating a policy group

Kate is the first contributor we need to set up for the Visit & Experience department. Therefore, there is not currently a policy group for her to belong in, so we need to create one:

1. Click on the **Security** tab then click on the **Policy** tab. The **Policy** tab should now be displayed.



Policy tab

2. Click on the **Create a Policy Group** link (under the **Policy Groups** heading). The **Create a Policy Group** screen should now be displayed.

Create a Policy Group screen

3. Enter a name for the new Policy Group, add any notes, then click on the **Create Policy Group** button. The **Edit Policy Group** screen should now be displayed.



Default

OK: Policy Group Update/Create success

EDIT POLICY GROUP

Policy Group Name:
Visit & Experience Contributors

Policy Group Notes:
Visit & Experience Access - Contributors

Update Policy Group Delete Policy Group

Edit Policy Group screen

Setting permissions for a Policy Group

1. Click on the **Policy Group Permissions** link (under the **Policy Groups** heading). The **Permissions on Policy Group** screen should now be displayed.

PERMISSIONS ON POLICYGROUP(POLICYGROUP)

Policy Group: Visit & Experience Contributors

| | |
|---------------------------------|-----------------------------------|
| Anonymous | |
| Business Services Publishers | |
| Contributors | |
| Admin Member | |
| Publishers | |
| AdminC SiteAdmin | |
| SysAdmin | |
| AdminG Theatre Publishers | |
| Visit & Experience Contributors | |
| AdminSearchTab | <input type="button" value="No"/> |
| ContentCategorisationTab | <input type="button" value="No"/> |

Permissions on Policy Group screen

2. Choose the **Visit & Experience Contributors** Policy Group from the dropdown list.
3. Set the permissions the way you need them, then click on the **Update** button.

Note: - In this example the permissions have been set in this step to be identical to those of a global "Contributor". The difference is that later on, we are going to limit members of the Visit & Experience Contributors Policy Group to have access only to the Visit & Experience branch of the navigation tree. Don't forget to click on the **Update** button when you are finished.



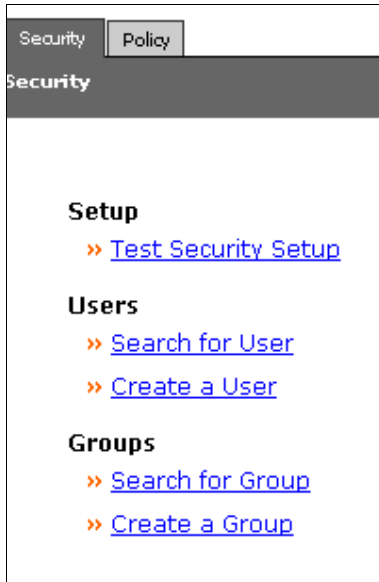
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Creating a security group

Create a security group with the same name: "Visit & Experience Contributors".

1. Click on the **Security** tab on the left of your screen (still under the main **Security** tab section). The **Security** tab should now be displayed.



Security tab

2. Click on the **Create a group** link (under the **Groups** heading). The **Create a Group** screen should now be displayed.

Create a group screen

3. Enter the Group Name ("Visit & Experience Contributors") and any Group Notes ("Visit & Experience Contributors Access"), then click on the **Create Group** button. The **Edit Group** screen should now be displayed.



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Default

OK: Group Update/Create success

EDIT GROUP

UserDirectory: DAEMONUD

Group Name:
Visit & Experience Contributors

Group Notes:
Visit & Experience Contributors Access

Update Group Delete Group

Edit Group screen

Creating a user

1. Click on the **Create a User** link (under the **Users** heading). The **Create a User** screen should now be displayed.

CREATE USER

Select a user directory to create the user in. CLIENTUD

User Login: kte

User Notes: Visit & Experience Contributor

User Password: menpear886
Generate Random Password

User Status: Active

Create User

Create a User screen

2. Fill in the form then click on the **Create User** button. The **Edit User** screen should now be displayed.



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EDIT USER

UserDirectory: CLIENTUD

User Login:

User Notes:

User Password:

User Status:

Member of Groups: None.

Edit User screen

Now that the user "kte" has been created, we need to allocate Kate to a Security Group.

3. Click on the **Manage Groups** button. The **Manage User Groups** screen should now be displayed.

MANAGE USER GROUPS (KTE)

Member of:

Visit & Experience Contrib

Not a Member of:

Contributors
Member
News Contributor
Publishers
SiteAdmin
SysAdmin
Theatre Publishers

Manage User groups screen

4. Select the group(/s) you want the user to belong to (e.g. "Visit & Experience Security ") then click on the left arrow button () to move the group Into the **Member of** list.
5. When you have finished, click on the **Update** button.



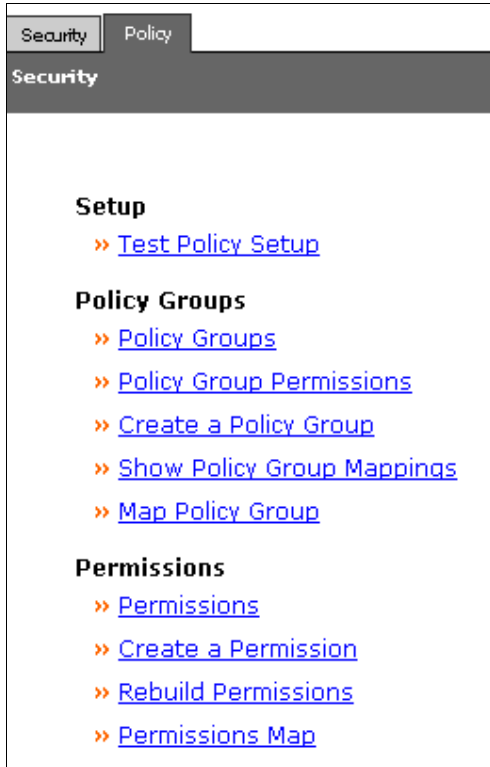
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Mapping Policy Groups

Now we need to map the Visit & Experience Security group to the Visit & Experience Policy Group:

1. Click on the **Policy** tab. The **Policy** Tab should now be displayed.



Policy tab

2. Click on the **Map policy group** link (under the Policy Groups heading). The **Map a policy group** screen should now be displayed.



Map a policy group – step 1

3. Click on the **Next** button. **Map a policy group – step 2** should now be displayed.



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MAP A POLICY GROUP

Please select a external group to map from:
Visit & Experience Contributors

Please select a policy group to map to:
Visit & Experience Contributors

Map Group

Map a policy group – step 2

4. Choose the Groups to be mapped. For this example, map the Visit & Experience Contributors External (security) group to the Visit & Experience Contributors Policy Group.
5. Click on the **Map Group** button. The **Map a group confirmation** screen should now be displayed.

Default

MAP A POLICY GROUP

OK:
Policy group mapping added.

Map a group confirmation screen

Setting permissions for a branch

We now need to set the permissions in the "Visit & Experience" branch of the site tree

1. Click on the **Site** tab.
2. Using the site tree, navigate to and click on the branch you would like to set permissions for. For this example, go to the **Visit & Experience** branch.
3. Right-click on the branch then choose **Permissions** from the shortcut menu. The **Permissions on...** screen should now be displayed.



PERMISSIONS ON VISIT + EXPERIENCE(DMNAVIGATION)

Policy Group: Visit & Experience Contributors Update

| | | |
|-----------------|---------------------------------|-----------|
| Permissions | Anonymous | Inherited |
| | Business Services Publishers | |
| | Contributors | |
| Approve | Member Publishers | Inherit |
| | SiteAdmin | |
| CanApp | SysAdmin | Inherit |
| | Theatre Publishers | |
| Contains | Visit & Experience Contributors | Inherit |
| | | |
| Create | Inherit | Inherit |
| Delete | Inherit | Inherit |
| Edit | Inherit | Inherit |
| RequestApproval | Inherit | Inherit |
| SendToTrash | Inherit | Inherit |
| View | Inherit | Inherit |

Permissions on... screen

4. Choose the **Visit & Experience Contributors** Policy group from the Policy Groups drop-down list.
5. Set the permissions for the Visit & Experience Contributors Policy group by clicking on the **Inherit** buttons (they will toggle through inherit, yes and no).
6. Click on the **Update** button. The **Permissions confirmation** screen should now be displayed.

Overview Edit Archive Audit Stats Dump

← Overview

Update Permissions.....
Updating Permission Cache (This may take a moment)
** Complete! **

Permissions confirmation screen



Note: Now if Kate logs into FarCry and selects anywhere on the site tree other than her area “Visit & Experience, there is not option to do anything except “preview” i.e.:

BUSINESS SERVICES

| Overview | What would you like to do now? |
|---|--|
| Object Title: Business Services Created by: farcry Date Created: 14-Nov-03 Locking: Unlocked | Edit/Change Status General » Preview |

Legend

- Draft
- Pending Approval
- Approved/Live

However, if you click on the “Visit & Experience” branch, Kate can access a number of options as per her “Contributor” permissions:

VISIT + EXPERIENCE

| Overview | What would you like to do now? |
|--|--|
| Object Title: Visit + Experience Created by: farcry Date Created: 14-Nov-03 Locking: Unlocked | Edit/Change Status » Send object back to draft » Send branch back to draft Create » Create Navigation » Create HTML Page » Create Include » Create Image » Create File » Create Flash » Create CSS » Create Link General » Preview |

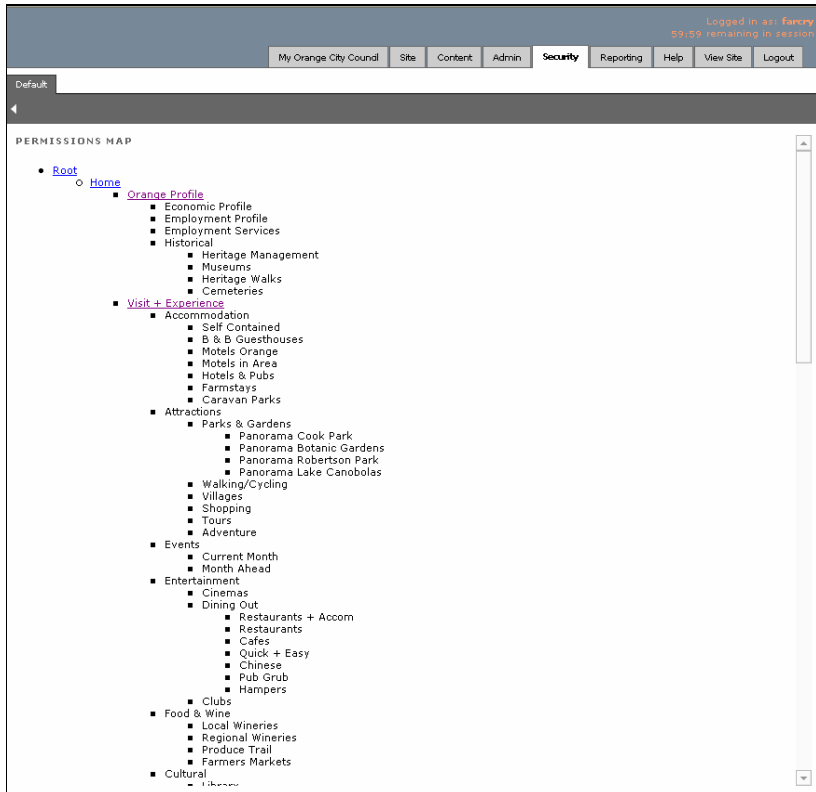
Legend

- Draft
- Pending Approval
- Approved/Live

Editing Permissions using the Permissions map

Note: You must be logged in as a site or systems administrator to view the **Permissions map**.

1. Click on the **Security** tab then click on the **Policy** tab.
2. Click on the **Permissions map** link (under the **Permissions** heading). The permissions map should now be displayed on the right hand side of the screen



Permissions map

3. Click on the branch you would like to edit the permissions for (e.g. the Visit & Experience branch). The permissions on... screen should now be displayed.
4. You can now edit the permissions in the same way as you set them (See **Setting Permissions for a branch** section).