

USER DOCUMENTATION 

CROWNPEAK ADMIN TRAINING EXERCISES

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ADMIN EXERCISES

Complete these exercises using the slides available in [Agency Admin Training Presentation.pdf](#)

➤ Lesson 1: Create request for support

1. Create request for support (Steps)

a. Before reporting an issue to CrownPeak, complete the following

i. Identify the type of issue. They will typically fall into a few categories

1. Performance issues

2. Application

a. Publishing (e.g., publishing errors, pages not publishing, etc.)

b. Template (e.g., missing links in publish, images not showing in preview, etc.)

c. CMS bug (e.g., unexpected behavior when working in CMS)

ii. Try some common quick fixes

1. Using templates in ways other than they were designed,

2. Inspect a known working page and see how it was configured and what's different

3. Refer to any UAT or existing documentation

iii. If none of these steps has helped resolve the issue, contact CrownPeak support

1. In the left menu, choose **Help**

2. Use **Contact Support** button in CrownPeak, and provide the following information

a. Name

b. Type of issue – Technical, Work request, or Feedback

c. Subject

d. In the description, try to include the following information and answer the following questions

i. Is the problem in the CMS, the published site or both?

ii. If it is in the CMS, can you tell if it is a template issue (isolated to a specific page or group of pages), or a CMS issue (functionality)?

iii. For CMS issues, **please find the CMS ID** for the affected asset if possible, or at least the path to the asset. For Site issues, send the URL. (See Finding the CMS ID, below.)

iv. **Send a screen grab** if possible, which is often a big help. There are many ways to capture images.

1. If you are on Windows, you can press the Print Screen button on your keyboard to capture the whole screen, or Alt-Print Screen to capture the active window. Both actions copy the screenshot to your Clipboard, which you can then paste into Microsoft Word and send it along. Other programs can do this; we use Snagit from

TechSmith, which allows you to capture a portion of the screen using hot keys.

2. On Mac OS X computers, use Command-Shift-3 to capture the entire screen, or Command-Shift-4 to select a part of the screen to capture. The Mac OS by default creates png graphic files on your desktop named "Picture #.png" that can be easily uploaded and sent to us as attachments to email.

↗ Lesson 2: User/Groups exercises

User/Groups exercises should be done on <https://cms.crownpeak.com/Training1/UI/>

1. Create new group

- a. In the training instance , go to **Settings > User/Groups > Groups**
- b. Select and right-click and clone the "Author" group – name it whatever you like
 - i. This group defines what the user will be able to do in – edit, publish, set properties, etc
- c. Edit your new group
 - i. Uncheck the permissions related to renaming and deleting
- d. Select and right-click and clone the US group – include "View Group 1" in the name
 - i. This group defines what a user can see – The US site or not, The Canada site or not.
- e. Select and create a second clone of the US group – include "View Group 2" in the name
- f. You have created 3 groups – 1 based on Authors, 2 based on the US view group

2. Assign users to groups

- a. Go to **Settings > Users/Groups > Users**
- b. Select New User button or right-click and clone an existing user. Configure this new user so that it is a member of two groups – the group based on Authors and View Group 1
- c. Create a second user that is a member of two groups – the group based on Authors and View Group 2

↗ Lesson 3: Configure Access

1. Configure access

- a. Navigate to **/Sandbox for Admins**. Use **New > Folder** to create a folder for your work, if you do not have one already.
- b. In this folder, create 2 more. Call one "View 1" and the other "View 2"
- c. Select View 1 and choose **Properties > Access** from the right rail

- d. Select and expand the “Edit” column and uncheck the “Edit” permission for members of your new author group. You should also see that you cannot set Rename or Delete permissions for your author group
- e. Select and expand the “View” column. Update the “View” setting so only the View Group 1 has permission
- f. Click “Save’
- g. Select View 2 and choose Properties > Access from the right rail
- h. Select and expand the “Edit” column and uncheck the “Edit” permission for members of your new author group. You should also see that you cannot set Rename or Delete permissions for your author group
- i. Select and expand the “View” column. Update the “View” setting so only the View Group 2 has permission
- j. Click ‘Save’
- k. In folders View 1 and View 2, select **New > File** to create a templated asset. Link it to the Detail Page template. For each file complete the following
 - i. Select your new page and choose **Properties > Access** from the right rail.
 - ii. Select **inherit access right from parent** and save
 - iii. Choose **Properties > Workflow** from the right rail
 - iv. Select **Basic Workflow** and save
- l. Open a new CrownPeak client and log in as your new users. Navigate to your folder under **Sandbox for Admins** and verify that they cannot edit, rename, or delete your Folder. Verify that you cannot view the Folder unless you are in the correct view group

➤ Lesson 4: Configure Publishing

1. Configure publishing for new site (steps)
 - a. Go to your View 2 folder
 - b. Select **Properties > Publishing** from right rail
 - c. Configure HTML publishing for the Dev Site package.
 - i. Enter **/View2/** for the path
 - ii. Leave filename blank
 - iii. Leave layout file blank (CrownPeak will automatically select output.aspx, the default layout file)
 - d. Select **Add HTML** button and repeat these steps for Stage Site and Live Site
 - e. Configure media publishing for Dev, Stage, and Live Sites by selecting **Add Media** button
 - i. Enter **/View2/media/** for the path
 - ii. Leave filename blank
 - iii. Leave layout file blank (CrownPeak will automatically select output.aspx, the default layout file)

- f. Click 'Save'
2. Verify publishing configuration
 - a. Navigate to **/View2/** and Create a new File from the new menu, Enter a file name,
 - b. Select the **System/Templates/Sandbox/Example Template** template and click 'ok'
 - c. Select the asset by single-clicking on it.
 - d. Select **Properties > Publishing**.
 - i. This asset is inheriting the publishing properties from the folder
 - ii. Filename displays FTP location
 - iii. URL links to published content (based on package configuration)
 - iv. Information also visible in General Properties as well as a record of actual files published, which can be helpful in verifying configurations and/or troubleshooting.

↗ Lesson 5: Publish a Page

1. Publish page
 - a. On your test asset, add workflow by clicking **Properties > Workflow**, Select 'Basic Workflow' and click 'save'
 - b. Select **Workflow > Send to Dev** from content menus at the top
 - c. Select the publishing monitor in the bottom right. Verify that your page has been published to the dev server
 - d. Close the monitor and go to **Properties > General**
 - e. Select the Dev url to see the published page
 - f. Publish to the staging server by selecting **Workflow > Send to Stage** from the content menus at the top
 - g. Follow steps above to view General properties and verify and view our page has published
 - h. Finally, push the page to visitors on the public site by publish to the live server by selecting **Workflow > Deploy to Live** from the content menus at the top
 - i. Follow steps to view General Properties above to verify and view our page has published

↗ Lesson 6: Test Group and User Access

1. Testing new group and site by
 - a. Sign out and sign in as View Group 2 user
 - b. Verify the following
 - i. Logging in
 1. Are you able to get to all the content you need to?

2. Are you able to move content through workflow as expected?
- ii. Publishing
 1. Do you have access to publish to the servers you expect?
 2. Is the content reaching the server?