

CONFIGURING COMPLIANCE – ACCESS PROPERTIES

CONFIDENTIAL

ACCESS CONTROLS: 3 TIERED SYSTEM

Groups: “Who”

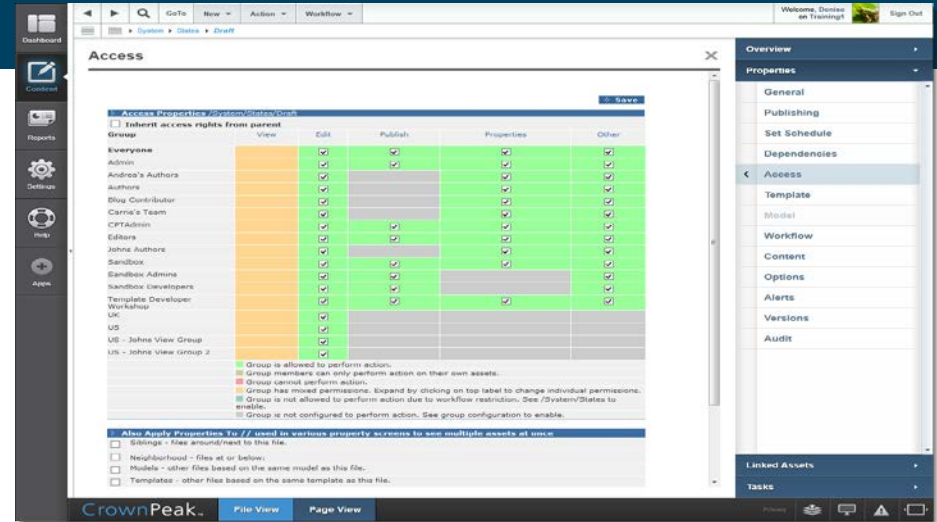
Most global

States: “When”

Tied into workflow

Assets/Folders:
“What/Where”

What you can do with specific content



All three together are the who, what, where and when

Groups

Most global

All users must be in at least one group

If setting is not active here, will not show up in State or Asset level

Supports multi-select, allows comparison of settings

User/Group matrix makes it easy to assign people en masse

Edit Group Admin [Save] [Cancel]

*Group Name: Admin

Description: Admin can administer all content and create new user accounts.

Group members:

Andraa Griffiths	Andrey Karpik	Cara Goodwin	Raja Radwan	CrownPeak Admin
Denise Duncan	Fahd Shaaban	Greg Almone	Gyula Csontos	Jazen Yoo
Justin Dantzer	John Ford	Joe Gallagher	Jim Howard	Justin Imel
Luai Kamal	Mahati Rapol	Mark Christian	Matt Green	Tim Griffiths
Erin Willard	Joy William	Zach Sutter	Zack Martin	

User Preferences:

- Users can set their login view.
- Users can set task alert preferences.
- Users can set their default folder preferences.
- Users can set and view their flagged assets.
- Users can set their 'other' preferences.
- Users can set their annotation preferences.
- Users can view a summary page.
- Users can set their summary page preferences.
- Users can view their queued documents.
- Users can view their modified documents.
- Users can view their modified but not republished documents.
- Users can view their workflow tasks.

Access Properties /corelogic.com

Inherit access rights from parent

Group	View	New	Edit	Publish	Properties	Other
Everyone				<input checked="" type="checkbox"/>		
Admin				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Authors					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CPTAdmin				<input checked="" type="checkbox"/>		
Editors				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[title] - denotes ACL's that are for files in this folder that inherit these ACL's

- Group is allowed to perform action.
- Group members can only perform action on their own assets.
- Group cannot perform action.
- Group has mixed permissions. Expand by clicking on top label to change individual permissions.
- Group is not allowed to perform action due to workflow restriction. See /System/States to enable.
- Group is not configured to perform action. See group configuration to enable.

States

Located in /System/
States

Edit to change name
and color

Properties > Access to
edit Access Properties

Interface is same as
assets – difference is how
they are used in Workflow

/System/States has files and
folders: different access
permissions needed

The screenshot shows the CrownPeak WCM interface. The main area displays a table of States with columns for Type, Label, Status, Changed By, Changed On, Size, Template, and ID. The table lists various states like 'Approved Folder', 'Archived Folder', etc. An 'Overview' panel on the right shows details for a selected state, including its label, asset ID, type, and last modified information.

The screenshot shows the 'Access Properties' dialog for the path /System/States/Live. It includes a legend for the permissions table and a list of user groups with their respective access rights.

Legend:

- Green: Group is allowed to perform action.
- Yellow: Group members can only perform action on their own assets.
- Red: Group cannot perform action.
- Orange: Group has mixed permissions. Expand by clicking on top label to change individual permissions.
- Blue: Group is not allowed to perform action due to workflow restriction. See /System/States to enable.
- Grey: Group is not configured to perform action. See group configuration to enable.

Group	View	Edit	Checkout	Shortcut	Rename	Delete	Move	Copy	Branch	Publish	Properties	Other
Everyone		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Admin		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Authors		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
CPTAdmin		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Editors		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Assets

What you can do with
specific content

Properties > Access on any
File or Folder

Used on content, Models,
Templates, etc.

Access Properties /corelogic.com

Inherit access rights from parent

Group	View	New	Edit	Publish	Properties	Other
Everyone				<input checked="" type="checkbox"/>		
Admin				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Authors					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CPTAdmin				<input checked="" type="checkbox"/>		
Editors				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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- Group cannot perform action.
- Group has mixed permissions. Expand by clicking on top label to change individual permissions.
- Group is not allowed to perform action due to workflow restriction. See /System/States to enable.
- Group is not configured to perform action. See group configuration to enable.

CONFIGURE ACCESS



Navigate to **/Sandbox for Admins**. Use **New > Folder** to create a folder for your work, if you do not have one already.

In this folder, create 2 more. Call one “View 1” and the other “View 2”

Select View 1 and choose Properties > Access from the right rail

CONFIGURE ACCESS



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

CONFIGURE ACCESS



Select and expand the “View” column. Update the “View” setting so only the View Group 1 has permission

Click **Save**

Select View 2 and choose Properties > Access from the right rail

CONFIGURE ACCESS



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

Select and expand the “View” column. Update the “View” setting so only the View Group 2 has permission

CONFIGURE ACCESS



Click 'Save'

In folders View 1 and View 2, select **New > File** to create a templated asset. Link it to the Detail Page template.

Select **Basic Workflow** from the dropdown and save

Sign out and sign in as newly configured users

Verify the following

Logging in

Are you able to get to all the content you need to?

Are you able to move content through workflow as expected?

Publishing

Do you have access to publish to the servers you expect?

Is the content reaching the server?

Additional Permissions - Also note whether you can delete/rename files

MODULE 3: CONFIGURE COMPLIANCE

VERIFYING USER ACCESS

