

CONFIGURING COMPLIANCE — Groups

CONFIDENTIAL

CONFIGURING COMPLIANCE

Group Definitions and Configuration

- For each group define and document
 - Editing permissions
 - Access by Workflow step
 - Workflow command permissions

Access Configuration

- Configure Three Tiers of Access
 - Who – Group level access
 - When – State-based access
 - Where – Asset and folder access

Workflow Configuration

- Define Workflow Steps
- Define transitions
- Configure scripts
- Configure notifications
- Configure publishing
- Configure filters

USERS AND GROUPS



Default groups

Creating and modifying groups

Users belong to one or more groups

Groups have permissions to perform different actions on different assets / objects

The screenshot displays the CrownPeak user management interface. On the left is a navigation sidebar with icons for Dashboard, Content, Reports, Settings, Help, and Apps. The main content area is divided into a left-hand menu and a right-hand main panel. The left-hand menu includes sections for Account, Users / Groups (with 'Users' selected), Groups, User / Group Matrix, Workflow, Publishing, Configuration, Tools, and Connectors. The right-hand panel shows the 'Users' management screen, which includes search and filter options (GoTo, New, Action, Workflow) and form fields for Name, Phone, Title, Department, and Location. Below these fields is a table listing users with columns for Login Name and Real Name. At the bottom of the table are 'New User' and 'Edit User' buttons.

Login Name	Real Name
AdminTest1	Bob The Author
AdminTest2	Bruce The Other Author
andrey.delgado@bos2digital.com	Andrey Delgado
arcadio.osuna@crowpeak.com	Arcadio Pesqueira Osuna
b.girman@ameria.de	Bogdan Girman
christopher.urquidi@crowpeak.com	Christopher Urquidi
david.anthony@crowpeak.com	David Anthony
diego.pereira@tangomodem.com	Diego Pereira
EMcCulloch@tmw.co.uk	Ed McCulloch
flyrun2000@yahoo.com	Brian Wright
GBuat-Menard@tmw.co.uk	Guillaume Buat-Menard
gustavo.katcheroff@tangomodem.com	Gustavo Katcheroff

Default Groups

Admin

Editor

Author

Recommended

Developer

The screenshot displays the CrownPeak user management interface. On the left is a navigation sidebar with icons for Dashboard, Content, Reports, Settings, Help, and Apps. The main content area is divided into a left-hand menu and a right-hand configuration panel.

The left-hand menu includes the following items: Account, Users / Groups, Users, Groups (highlighted), User / Group Matrix, Workflow, Publishing, Configuration, Tools, and Connectors.

The right-hand panel is titled "Edit Group" and is configured for the "Authors" group. It includes a "Group Name" field with the value "Authors" and a "Description" field with the text "Authors can create new site content." Below this is a "Group members" table listing various users, and a "User Preferences" section with several checked options.

Edit Group Authors			
*Group Name	Authors		
Description	Authors can create new site content.		
Group members	Andrea Griffiths chance schultz Denise Duncan Fares Noueihed Jackie Farah John Akin Kunal Shah Luis Torres Menna Kearns Patrick Desbrow Sara Sims Steven Plat Wan Cho	Andrey Delgado Christopher Urquidi Dhirendra Singh Brian Wright Jason Yoo John Wells Jonathan Jung Marc Wright Micah Naeser Percival Villegas Shagufata Chaudhari Test User Yuri Klimov	Arcadio Pesqueira Osuna CrownPeak Admin Diego Pereira Guillaume Buat-Menard Joseph Blankenship Joseph Blankenship Larra Elbert Matthew Basson Michael Borsari Pablo Ulman Simon Gentner UK Author Yogesh Tiwari
User Preferences	<input checked="" type="checkbox"/>	Users can set their login view.	
<input checked="" type="checkbox"/>	Users can set task alert preferences.		
<input checked="" type="checkbox"/>	Users can set their default folder preferences.		
<input checked="" type="checkbox"/>	Users can set and view their flagged assets.		
<input checked="" type="checkbox"/>	Users can set their 'other' preferences.		
<input checked="" type="checkbox"/>	Users can set their annotation preferences.		
<input checked="" type="checkbox"/>	Users can view a summary page.		
<input checked="" type="checkbox"/>	Users can set their summary page preferences.		

MODULE 3: CONFIGURE COMPLIANCE

DEFAULT GROUPS

Group Name	Description
Author	Can create and edit own content
Editor	Create and edit all CMS content and deploy to Staging and Live
Developer	Create and edit all CMS content and deploy to Staging and Live, create and edit templates
Admin	Add/delete users, view reports, content/approval override, Workflow Administration, Configuration in Staging and Live

Editing					
Group Name	Templates	Models	ACL	Workflow	Modify users & groups
Author	N	N	N	N	N
Editor	N	N	N	N	N
Developer	Y	N	N	N	N
Admin	N	Y	Y	Y	Y
User's Content					
Group Name	Draft	Rejected	Pending	Staging	Live
Author	Y	Y	N	N	N
Editor	Y	Y	Y	Y	Y
Developer	Y	Y	Y	Y	Y
Admin	Y	Y	Y	Y	Y
Other's Content					
Group Name	All States				
Author	N				
Editor	Y				
Developer	Y				
Admin	Y				

Create and edit users with
Settings > Users/Groups

The screenshot displays the CrownPeak user management interface. On the left is a vertical navigation menu with icons for Dashboard, Content, Reports, Settings, Help, and Apps. The main content area is titled 'Users' and includes a search bar, 'GoTo', 'New', 'Action', and 'Workflow' dropdowns. Below these are sections for 'Account', 'Users / Groups', 'Groups', 'User / Group Matrix', 'Workflow', 'Publishing', 'Configuration', 'Tools', and 'Connectors'. The 'Users' section is active, showing a table of users with columns for 'Login Name' and 'Real Name'. A context menu is open over the 'New User' button, listing options: 'New User', 'Clone User', 'Edit User', and 'Delete User'. At the bottom, there are 'New User' and 'Edit User' buttons, and a footer with the CrownPeak logo and 'File View' / 'Page View' options.

Login Name	Real Name
AdminTest1	Bob The Author
AdminTest2	Bruce The Other Au
andrey.delgado@boszdigital.com	Andrey Delgado
arcadio.osuna@crownepeak.com	Arcadio Pesqueira C
b.girman@ameria.de	Bogdan Girman
christopher.urquid	Christopher Urquidi
david.anthony	David Anthony
diego.pereira@	Diego Pereira
EMcCulloch@tmw.co.uk	Ed McCulloch
flyrun2000@yahoo.com	Brian Wright
GBuat-Menard@tmw.co.uk	Guillaume Buat-Men
gustavo.katcheroff@tangomodern.com	Gustavo Katcheroff

CREATE NEW GROUPS



Go to **Settings > User/Groups > Groups**

Select and right-click and clone the “Author” group – name it whatever you like

This group defines what the user will be able to do in – edit, publish, set properties, etc

CREATE NEW GROUPS



Edit your new group

Uncheck the permissions related to renaming and deleting

Select and right-click and clone the US group – include “View Group 1” in the name

This group defines what a user can see – The US site or not, The Canada site or not.

CREATE NEW GROUPS



Select and create a second clone of the US group – include “View Group 2” in the name

You have created 3 groups – 1 based on Authors, 2 based on the US view group

ASSIGN USERS TO GROUPS



Go to **Settings > Users/Groups > Users**

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

ASSIGN USERS TO GROUPS



Create a second user that is a member of two groups – the group based on Authors and View Group 2