

User Management (PRO)





The User Management and User Management PRO Module

User Guide

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About this document

Purpose of this document

This document treats the webEdition User Management and User Management PRO Modules.

You can use this manual to learn:

- what the User Management Modules are
- how to install these module
- how to use these module to create and manage the user permissions for administrators and editors on your Web development team

Structure of this document

This document is divided into two parts:

- If you have installed the User Management Module, see the following chapters
 - Chapter 1, "User Management: Introduction" on page 15
 - Chapter 2, "Working with the User Management Module" on page 19
- If you have installed the User Management PRO Module, see the following chapters
 - Chapter 3, "User Management PRO: Introduction" on page 23
 - Chapter 4, "Creating users, groups and "aliases" in the User Management PRO Module" on page 29
 - Chapter 5, "User Management PRO Module tags and functions" on page 37

Audience

This document is intended for personnel in the following groups:

Web administrators

Note: The procedures described in this manual can only be performed by persons who have administrative user privileges.

Web editors

The webEdition customer documentation suite

The documentation team publishes new webEdition documents to support the release of all webEdition features, modules and enhancements.

You can consult our documentation suite for detailed information about the modules you have purchased or about webEdition products that you may wish to purchase in the future. All customer documentation is available in portable document format (PDF) on the webEdition documentation Web page.

On-line reference documentation

The webEdition customer documentation suite comprises the following books, all of which you can obtain at URL: http://www.living-e.de/

Standard webEdition documentation

The following books support the webEdition Standard suite:

- The webEdition User Guide
- The webEdition Installation Guide
- The webEdition Tag Reference

Documentation for webEdition modules

The following books support the webEdition modules:

- The Customer Management and Customer Management PRO Module User Guide
- *The Database/Object Module User Guide*
- The Editor-PlugIn User Guide
- The Newsletter Module User Guide
- The Scheduler and Scheduler PRO Module User Guide
- The Shop Module User Guide
- The Task Messaging Module User Guide
- The User Management and User Management PRO Module User Guide
- The Workflow Module User Guide

What precautionary messages mean

webEdition documents include attention and caution messages, which are designed to draw your attention to important instructions.

Attention boxes

An attention box identifies information that is necessary for the proper performance of a specified task. For example:

ATTENTION

You must have the appropriate permissions in your user profile to complete this procedure. Permissions are assigned to you by your webEdition system administrator. Contact your webEdition system administrator for further details

Caution boxes

Caution messages indicate that there are possible risks to your software or database if you perform a specified task without taking the suggested appropriate precautions. For example:



CAUTIONDatabase warning

If you complete this procedure, your database will be overwritten.

How commands, system responses and we:tags are represented

The commands, system responses and webEdition tags (called we:tags) used in this document conform to the following conventions.

Web interface commands

Commands performed through a Web browser are shown in *italic* typeface. For example:

Click on the *Save* button.

Menu-based commands performed in a Web browser are shown in *italic* typeface. Drop-down or nested menu commands are separated by an input prompt (>). For example:

Select *Customers* > *New* from the main menu of the Customer Management Module.

webEdition tags and template code

The webEdition templates use a specialized set of programming tags based on the PHP programming language. These webEdition tags or we:tags are displayed in courier typeface and in angled brackets:

Opening tags appear thus: <we:tag/>

Closing tags appear thus: </we:tag>

The programming code used in webEdition templates is also represented in this document by courier typeface:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print"/><br>
Logged in
</we:ifRegisteredUser>
```

Attribute variables

Attributes and variables appear in *courier italic* typeface. For example:

```
<we:hidden name="attribute1">
```

How to check the document version and issue

The information on the title page of this document indicates the version and issue for this publication. The version and issue also appear in the footer on every even-numbered page.

The first two digits in the document numbering scheme indicate the version. The version number increases each time the document is updated to support a new software release. For example, the first release of a document is 01.01. In the next software release cycle, the first release of the same document is 02.01.

The second two digits in the document numbering scheme indicate the issue. The issue number increases each time the document is revised and re-released in the same software release cycle. For example, the second release of a document in the same software release cycle is 01.02.

Customer service

For further information about webEdition, please consult our Web page, or contact our customer service department:

- Web Page:http://www.webedition.biz/
- E-mail:
 - Technical support: technik@living-e.de
 - Sales: sales@living-e.de
 - Information/Help: info@living-e.de

1 User Management: Introduction

This introduction is intended to help you familiarize yourself with the webEdition User Management Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the User Management Module. These topics are treated in the following sections:

- Section 1.1, "What is the webEdition User Management Module?" on page 15
- Section 1.2, "Installation" on page 15
- Section 1.3, "Access control feature" on page 15
- Section 1.4, "General information and navigation" on page 15

1.1 What is the webEdition User Management Module?

The webEdition software differentiates between the role of the administrator and the role of the editor. Normally, the administrator is responsible for the design and creation of the templates, whereas the editor creates and maintains the content. The webEdition User Management Module allows you to manage as many administrators and editors as you want.

1.2 Installation

The installation procedure for all modules is described in *The webEdition Installation*, *Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: http://www.living-e.de

1.3 Access control feature

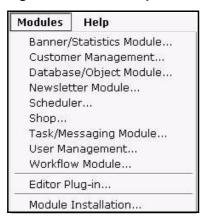
The webEdition User Management Module prevents multiple users from editing documents simultaneously. Thus the potential risk of over-writing is minimized.

A document can be edited by only one user at any given time. If two or more users are logged onto the server and attempt to open the same document, the document will only be made available to the user who selected it first. If any other users try to open the document, a dialog box will appear on their screen informing them that the document is currently being edited by user "XYZ". As soon as user "XYZ" closes the document, opens another document or logs off, another user will be allowed to edit the document.

1.4 General information and navigation

After installation, you will find a new menu item in the webEdition main menu called *Modules*, which contains all the modules in your installation of webEdition (see Figure 1).

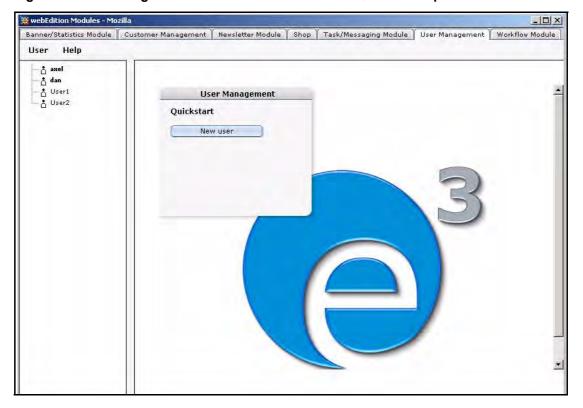
Figure 1 Modules drop-down menu



1.4.1 Opening the module

Select *User Management* from the *Modules* menu to open the User Management main screen. The User Management Module main screen opens showing the Quickstart screen (see Figure 2).

Figure 2 User Management Module: main screen and Quickstart option



Using the *Quickstart* screen, you have the option of going directly to the add new user screens.

You can return to the *Quickstart* screen at any time by clicking on the *User Management* tab.

1.4.2 Drop-down menu commands

On the User Management main screen, a list of users appears in the explorer menu; two drop-down menus appear in the upper left: *User* and *Help*, as seen in Figure 2, "User Management Module: main screen and Quickstart option" on page 16.

1.4.2.1 The *User* menu

The *User* menu has the following items (see Figure 3, "User Management User menu" on page 17):

- *New.* Use this command to create a new user (administrator or editor).
- Save. Use this command to save entries/changes made to users.
- Delete. Use this command to delete existing users (administrators or editors). You must confirm your deletion by clicking *OK* in the dialog box.
- Exit. Use this command to exit the User Management Module.

Figure 3 User Management User menu



1.4.2.2 *Help* menu

The main screen also has a *Help* menu. Use the *Help* command to access the help program for the User Management Module.

2 Working with the User Management Module

The following sections describe some of the basic procedures that you can perform with the User Management Module:

- Section 2.1, "Creating new users: administrators and editors" on page 19
- Section 2.2, "Changing user settings" on page 20
- Section 2.3, "Deleting users" on page 21

ATTENTION

Only an administrator can create or delete users and change user permissions. These options will not be available if you have logged into the webEdition system as an editor.

2.1 Creating new users: administrators and editors

The following procedure describes how to create new users and how to assign administrative or editorial prvileges to a user.

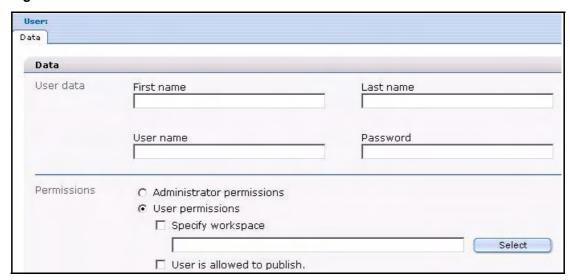
Procedure 1 Creating a new user

In the webEdition Start Screen

- Log into webEdition as "administrator".
- 2 Select *User Management* from the *Modules* menu.
- 3 In the User Management main screen, click *New user* in the *Quickstart* menu, or click on *User > New > User*.

The user Data view appears which has two parts: User data and Permissions (see Figure 4).

Figure 4 User Data view



- In the first two fields of the *User data* area, enter the following data:
 - First name of the new user
 - Last name of the new user
- In the next two fields enter the following data:
 - *User name*. The name that will identify the user in webEdition.
 - Password. Enter an alphanumeric string of at least 4 characters.
- If you wish to create an administrator, go to Step 7. If you wish to create an author, go to Step 8.
- To give a user administrative permissions, click on the Administrator permissions button, then go to Step 11.

Note: You cannot restrict the administrator's workspace - the option Specify/select workspace is inactive.

- To give a user authoring or editing permissions, click on the *User permissions* button. 8
- You can allocate a special workspace in webEdition to this user by clicking on the Specify workspace button.
- 10 Click on the Select button to browse and select the directories in which the author is allowed to work.

Note: The next time the author or editor logs on, the templates menu will be deactivated and the explorer menu will display the directory allocated by the administrator as the editor's workspace.

- **11** Save your changes by clicking on the *Save* button.
- 12 You have completed this procedure.

2.2 Changing user settings

Use the following procedure to change user settings.

Procedure 2 Changing user settings

In the User Management main screen

- Log into webEdition as "administrator".
- 2 Go to the user list in the explorer menu, and click on the user whose data you wish to change.

The system displays the user Data view.

- 3 Make your changes.
- 4 Save your entries.
- 5 You have completed this procedure.

2.3 Deleting users

Use the following procedure to delete a user from webEdition.

Procedure 3 Deleting users

In the User Management main screen

- Log into webEdition as "administrator".
- 2 Go to the user list in the explorer menu, and click on the user whose data you wish to change.

The system displays the user Data view.

- 3 Select the *Delete* command from the *User* menu.
- **4** When prompted by the system, confirm or cancel the action.

If you click OK, the selected user data will be deleted, the corresponding icon will disappear from the explorer menu, and the system will return to the User Management Module main screen.

5 You have completed this procedure.

22	Working with the User Management Module

3 User Management PRO: Introduction

This introduction is intended to help you familiarize yourself with the webEdition User Management PRO Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the User Management PRO Module. These topics are treated in the following sections:

- Section 3.1, "What is the webEdition User Management PRO Module?" on page 23.
- Section 3.2, "Installation" on page 24.
- Section 3.3, "General information and navigation" on page 24.

3.1 What is the webEdition User Management PRO Module?

The webEdition User Management PRO Module is designed to administer complex user structures. With this module you can set different permissions for working with documents, templates, directories and the system itself. Unlike the standard User Management Module, you can establish user groups with the PRO module. You can also create sub-groups on various levels. Each user can be assigned to individual or multiple groups.

Each individual object (text area, images) in a document can be assigned access privileges so you can precisely define which individual users or group members are permitted to create or modify a document/object. Specific workspaces and templates (in whole or in part) can be allocated to users.

3.1.1 User Management PRO and your organization

The User Management PRO Module allows you to assign permissions for the editing of your web site in a manner that is suitable to the structures of your company. You can grant access permissions to specified areas of your web site to specified individuals or groups within your organization. For example, you can create workspaces that correspond to the departments in your company; you can create user groups called "PR", "Sales" and "Marketing" and assign workspaces and relevant templates to them. Each group can define a department manager as a group administrator who has more permissions within his or her group. Group administrators can create sub-groups or create new users for these sub-groups. When a template administrator creates your webEdition templates, you can assign users or groups to specific portions of a document. You can, for example, allocate a text area exclusively to the "Sales" group, while only the "PR" group would be permitted to edit the pictures to go with the text area. New attributes in the we:tags have to be defined for this to be possible.

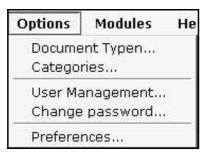
3.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: http://www.living-e.de

3.3 General information and navigation

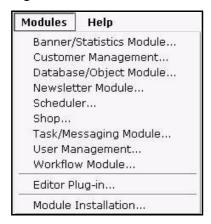
After installing the User Management PRO Module, the command *Change user* (normally seen in the *Options* menu in the standard version of webEdition) will be replaced by the command *User management* in the *Edit* menu (see Figure 5).

Figure 5 The Options menu showing User management command



You will also see the option *User management* in the *Modules* menu (see Figure 6).

Figure 6 The Modules menu



Select *User management* from the *Modules* menu to open the User Management PRO main screen. The main User Management Module page opens showing the *Quickstart* screen (see Figure 7).

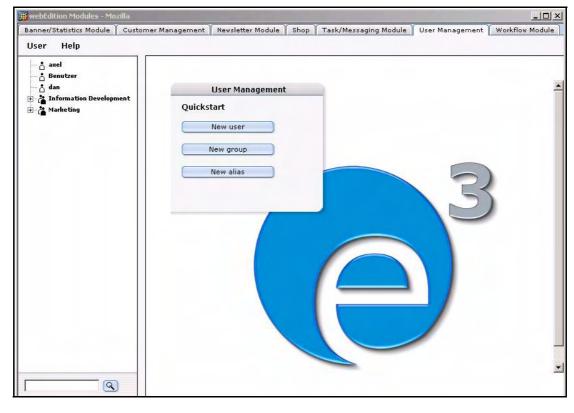


Figure 7 User Management Module: Quickstart screen

Using the *Quickstart* screen, you have the option of going directly to a new user, a new group or to a new alias.

3.3.1 The User Management PRO *User* menu

The User Management PRO Module *User* menu has the following items (see Figure 8).



Figure 8 The User menu

- •Save. This command allows you to save the current user(s), group(s), or alias(es).
- •Delete. This command allows you to delete the current user(s), group(s), or alias(es).
- •Exit. Use this command to exit the module.
- New. The *New* menu has the following sub-items (see Figure 8, "The User menu" on page 25):
 - User. This command allows you to create an identity for a user in the system.
 - Alias. This command allows you to create a copy of an individual user's main identity
 - Group. This command allows you to create a group or sub-group of users.

3.3.2 The User Management PRO explorer menu

The explorer menu in User Management PRO Module is structured like the menu used for documents and templates. There are two types of icons as seen in Figure 9:

- icon of a group
- icon of an individual user

Figure 9 Explorer menu: individual and group icons



The group icon can represent members and sub-groups. You can view the members and the sub-groups of a group by clicking on the plus "+" icon next to a group symbol (see Figure 10). The sub-groups can also contain users and groups of their own.



Figure 10 Explorer menu users and groups

Since individual users cannot have any "sub-users", they are one-level in nature. Users that appear in blue colour in the explorer menu are "aliases".

3.3.3 The User Management PRO Module main screen

The main screen is designed to allow you to enter and change data about your users and groups. To access the main screen, go to the explorer menu and click on the user or group whose data you wish to view or change.

The edit mode of the User Management PRO Module has three tabs, *Data*, *Permissions* and Workspace. You can access the associated views by clicking on the respective tab (see Figure 11).



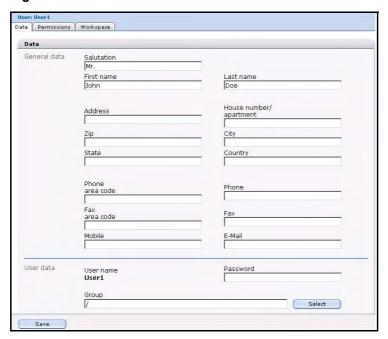
Figure 11 User Management PRO area tabs

Each of these views is discussed in more detail below.

3.3.3.1 The *Data* view

The Data view stores all the personal data of a particular user (see Figure 12). Only the administrator can change this information.

Figure 12 The Data view



3.3.3.2 The Permissions view

The Permissions view allows administrators to allocate permissions for a user (see Figure 13).

Note: Your view of the *Permissions* will vary depending on what modules you have installed.

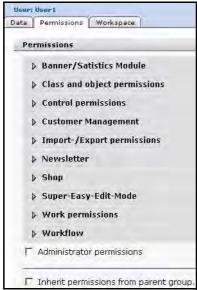


Figure 13 The Permissions view

The permissions are divided into the following options:

•"Permissions for installed modules". The webEdition modules have permissions that can be customized in the Permissions view of the User Management PRO Module. These options will vary depending on what modules you have installed. For information on how to set these permissions, see the documentation for the individual modules.

Note: If you have not installed all modules listed in Figure 13, "The Permissions view" on page 27, you will not be able to see these permissions in User Management PRO Module.

- Work permissions. In this area, you can assign any permissions related to working on documents and templates.
- Control permissions. In this area, you can assign any right related to the administration of users and groups.

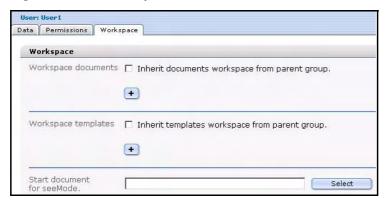
Click the arrows next to the permission options to reveal a series of check boxes indicating all the permissions that you can assign to your users.

3.3.3.3 The Workspace view

The Workspace view allows administrators to assign workspaces and templates to a user or group of users.

In the Workspace view, you can allocate users to fixed workspaces and special template sections. You can also assign more than one workspace or template section to a user by clicking on the "+" (plus) button. When users login to webEdition using the login data assigned to them in the *Data* view, the explorer menu will display only the workspaces allocated to them and they will only be able to use their assigned templates (see Figure 14).

Figure 14 The Workspace view



The Workspace view has the following areas:

- Workspace documents and Workspace templates. These areas have similar user controls. The checkboxes in *Workspace documents* and *Workspace templates* sections allow you to assign to users the workspaces and templates from the groups in which they are members. The trash bin icon allows you to delete the access to workspaces and templates for a particular user.
 - If you activate the *Default* checkbox in the *Workspace documents* area in conjunction with the Database/Object Module, you can assign default status to the workspace for which you intend to create new objects. The default workspace is the only workspace in which you can create objects based on the classes allocated in the Database/Object Module.
- Start document for SeeMode.
 - The User Management PRO Module allows you to assign a start document to a user who logs into webEdition in Super-Easy-Edit-Mode (SeeMode). Once a specified document has been selected, that document will automatically open for the user as soon as he/she logs in. For further details about the SeeMode, see *The webEdition* User Guide.

4 Creating users, groups and "aliases" in the User Management PRO Module

This chapter is intended to show you how to create new users, user groups or aliases by using the webEdition User Management PRO module. The following topics are treated in this chapter:

- Section 4.1, "Creating a new user" on page 29
- Section 4.2, "Creating a new group" on page 32
- Section 4.3, "Administering group membership" on page 33
- Section 4.4, "Creating an alias" on page 34

ATTENTION

Only an administrator and users who have been granted the appropriate permissions in the User Management PRO Module can create and maintain users and user groups. These options will not be available to you if you are not an administrator, or if you have not been given permission by the administrator to create, change or delete users or user groups.

4.1 Creating a new user

Use the following procedure to create a new webEdition user. When creating a new user you will be required to enter information in each of the areas that were described in Section 3.3.3, "The User Management PRO Module main screen" on page 26. This procedure has three parts, each part corresponds to an area (*Data*, *Permissions* or *Workspace*) in edit mode.

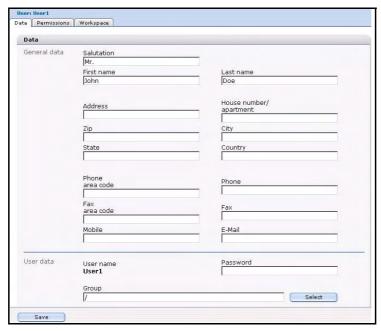
Procedure 4 Creating a new user

In the User Management PRO Module main screen (Part 1: the Data view)

- 1 To create a new user, click *User* > *New* > *User* in the User Management PRO Module.
- 2 Select the Data tab.

The system opens the Data view (see Figure 15).

Figure 15 The Data view



- 3 Enter all user-related information in the General data area.
- Allocate user names and passwords to new users in the *User data* area so that they can log
- 5 Assign the new user to a group in the Group section if they are to have their main identity within a group.
- You have completed Part 1. Go to Part 2.

(Part 2: the Permissions view)

Go to the Permissions view by clicking the Permissions tab. The system opens the Permissions view (see Figure 16).

Figure 16 The Permissions view

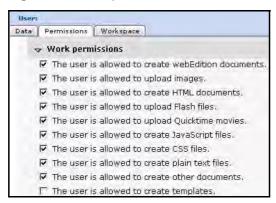


Click on the arrow next to Work permissions to reveal a series of check boxes indicating all the work permissions that you can assign to your users.

Assign the work permissions by selecting the appropriate checkboxes (see Figure 17 for a partial list of work permissions).

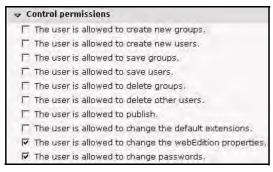
Note: The designation "Create" always refers to the menu item *File > New*. If any permissions are not available, the functions will be grayed out in the File menu.

Figure 17 Work permissions



- 10 Click on the arrow next to Work permissions to minimize the view, then click on the arrow next to Control permissions to reveal a series of check boxes indicating all the control permissions that you can assign to your users.
- 11 Assign the control permissions by selecting the appropriate checkboxes (see Figure 18).

Figure 18 Control permissions



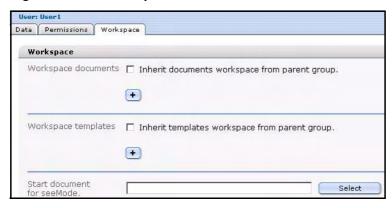
- **12** Click on the arrow next to *Control permissions* to minimize the view.
- 13 If you wish the user to have full administrative permissions, select the Administrator *permissions* check box that appears under the permission options (Refer to Figure 16, "The Permissions view" on page 30). Otherwise, leave this box unchecked.
- 14 If you want your user to inherit the existing rights from a parent group, use the last checkbox in the *Permissions* area, otherwise, leave this box unchecked.

(Part 3: the Workspace view)

15 Click the Workspace tab.

The system opens the Workspace view as seen in Figure 19.

Figure 19 The Workspace view



- 16 If you wish to assign to a user the same workspaces and templates that have been assigned to the group to which that user belongs, activate the checkboxes in Workspace documents and/or Workspace templates. Otherwise go to Step 17.
- 17 Click on the plus button below the checkboxes.

A field appears that allows you to select a workspace (see Figure 20).

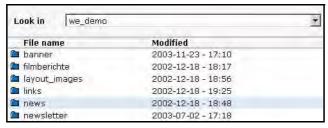
Figure 20 Selecting a workspace



18 Click the Select button to access a list of your directories from which you can choose the document or template you wish to assign to your user.

The system opens a Look in server browser (see Figure 21).

Figure 21 Look in server browser



19 Click the appropriate folder name, then click the *OK* button.

The name of the workspace or template will appear in the field to the left of the Select button.

- **20** Click the Save button at the bottom of the page.
- 21 You have completed this procedure.

4.2 Creating a new group

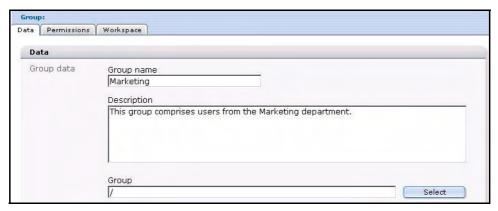
Use the following procedures to create a new user group. As above, in Procedure 4, "Creating a new user" on page 29, you must enter data into each of the three areas: the Data, Permissions, and Workspace areas.

Procedure 5 Creating a new group

In the User Management PRO Module main screen (Part 1: the Data view)

- To create a new group, click *User > New > Group* in the User Management PRO Module.
- In the Data view, enter all group-related information in the Group data area (see Figure 22).

Figure 22 Group data area



Note 1: The new group can be assigned to an existing group as a sub-group in the Group section.

Note 2: A new group will not yet have any members. Therefore the *User* area under the Group data area will be empty.

(Part 2: the Permissions view)

The Permissions view for the creation of a new group is the same as that for an individual user, with one exception: a group can never possess administrative permissions. Go to Procedure 4, "Creating a new user" on page 29, and complete Step 7 to Step 14, then go to Step 4 of the present procedure.

(Part 3: the Workspace view)

- The Workspace view for the creation of a new group is the same as that for an individual user. Go to Procedure 4, "Creating a new user" on page 29, and complete Step 15 to 17 then return to the present procedure.
- Select the Save button at the bottom of the page.
- You have completed this procedure.

4.3 Administering group membership

Use the following procedure to add, change or delete members in a group.

Procedure 6 Adding and editing group members

In the User Management PRO Module main screen

- You can assign new and existing users to a group. Do one of the following sub steps:
 - To assign a new user to a group, see Part 1 of Procedure 4, "Creating a new user" on page 29.
 - To assign an existing user to a group, go to the explorer menu and click on the icon of a user, then change that user's group affiliation by clicking the *Select* button adjacent to the *Group* field in the *Data > User data* view.

Data 🖃 🃸 Group2 Group data Group name 🗏 📸 Marketing Marketing 💍 User2 Description å User3 This group comprises users from the Marketing department. å User1 Group JUSTER. User3 User2

Figure 23 Assigning a user to a group

All members of this group will be listed in the User section. The icon representing the user also appears in the explorer menu in their assigned group folder

To edit the members of a group, highlight a user and click the *Edit* button. The system opens the Data view for the user you have selected. There you can edit the user profile and change the group affiliation.

Edit

You have completed this procedure.

4.4 Creating an alias

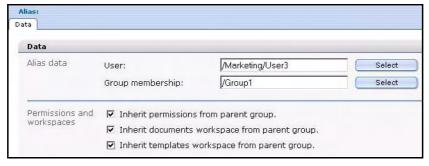
Each user has only one main identity—either as an individual user or as a member of a group. Users whose main identity is already assigned to another group use "aliases" (that is, another name), to join one or several additional groups. An "alias" is a copy of an individual user's main identity. This copy can be assigned to the group and is indivisibly linked to the main identity of the user.

Procedure 7 Creating an alias

In the User Management PRO Module main screen

Click on *User* > *New* > *Alias*. The Data view appears (see Figure 24)

Figure 24 The Alias view Data area



To allocate an "alias" to an existing user, use the Select button adjacent to the User field to browse the user list and to find the user's main identity.

- Create an alias for the user by assigning him or her to another group. To do so, click the Select button adjacent to the Group membership to find the group that will include the new "alias".
- You can use the checkboxes in the *Permissions and workspaces* area to assign to the "alias" the permissions, documents, and the templates of the parent group.
- Click Save.

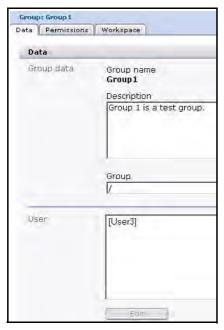
"Aliases" are displayed in blue in the explorer menu as seen in Figure 25.

Figure 25 Alias in the explorer menu



"Aliases" are displayed in square brackets in the User member summary for the groups in the Data view (see Figure 26)

Figure 26 Alias in a the group



You have completed this procedure.

36	6 Creating users, groups and "aliases" in the User Management PRO Module				

5 User Management PRO Module tags and functions

The following we:tags have been expanded to include a new attribute, user, for the User Management PRO Module:

```
• <we:flashmovie>
```

- <we:href>
- <we:img>
- <we:input> (all types)
- <we:textarea>

All these functions can be controlled directly using the User Management PRO Module. If you set the user attribute in these tags, you will be able to limit the function of that particular the we:tag to the users and groups specified in the user attribute. These attributes will remain in effect no matter what global permissions are assigned to individual users and groups in the *Permissions* area in User Management PRO Module. For example:

```
<we:textarea name="Text" cols="60" rows="30" dhtmledit="on"
showMenus="on" autobr="on" user="writer"/>
```

This example shows how you can limit the access to a single user, in this case the text area called *Text* can only be edited by the user called *writer*.

For further information about the advanced uses and syntax for the *user* attribute, consult the *webEdition Tag Reference Manual* at http://www.living-e.de

38	User Management PRO Module tags and functions

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