

## Group Manager

### Plan the Groups

ACM users are assigned to groups. Group settings are used to control user access to management tools, editor tools and establish workflow functionality. It is important to plan how to best group users. Consider the following when creating groups:

- ☐ Your organizational chart - break users into departments/functional areas; think about who will be performing tasks within each of those areas; for example:

- ☐ Mary will be creating content for the Human Resources department. She will not be performing any other functions. So she will be assigned to a Human Resources content provider group.

- ☐ Organize the users into groups based on their rights to do certain things within the department, for example:

- ☐ Mary will also need to access the Digital Assets Manager, the Pagelets (Syndication) Manager but no other Admin Center functions.

For more information on groups, see *Appendix B*.

### Group Folders

Group folders provide a method of organizing your groups into smaller, manageable, functional areas. When working in the Manage Folders area of the Group Manager you can only create, modify and delete folders. There is no access to groups.

#### Create Group Folder

1. Open the **Group Manager**.
2. Click **Manage Folders**.
3. Click **Add Folder**.
4. Enter the **Name** for the folder.
5. Provide a **Description** of the folder that others will see when viewing folders.
6. Select the **Parent Folder** for the new folder. This will determine the folder's location in the folder hierarchy.
7. Click **Save**. Repeat for all folders you wish to create.

#### Locate Group Folder

1. Open the **Group Manager**.
2. Click **Manage Folders**.

3. Using the **Parent Folder** dropdown expand the folder view until the folder is located.

### **Modify Group Folder**

1. Open the **Group Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Click the **Folder Name** to view the folder details.
5. Modify the **Name** or **Descriptions** fields, or select a new parent folder.
6. Click **Save**.

### **Delete Group Folder**

1. Open the Group manager.
2. Click Manage Folders.
3. Select the **Parent Folder** of the folder you want to modify.
4. Check the **Delete** box to the right of the Folder you want to delete. Click **Save**. OR Click the **Folder Name** to view the folder details. Click **Delete**.
5. Click **OK** in the confirmation dialog box.

**Tip** If you attempt to delete a Group Folder and there is still Groups or other Folders in it, you will receive a message warning of this fact and the folder will not be deleted. You must cancel the action and remove any dependencies from the folder. You will then be able to delete the folder.

### **Groups**

Group are used to control user access to management tools, editor tools and establish workflow functionality. Users can belong to multiple groups with different permissions. A user's rights within the ACM are created **from all the groups** they belong to.

### **Create Group**

1. Open the **Group Manager**.

2. Click **Add Group**.

3. Add the **Group Details** for the group.

**Name:** Enter the group name. Make sure you have given some thought to your group naming conventions prior to creating groups. **Description:** Enter a description that provides information about the group such as the department(s), access rights or other pertinent information. This information is useful for understanding the group's purpose. **Group Folder:** Select the folder you want to place this group in. The default is the root level Groups folder. **Group Type:** Select the Group Type(s) for the group. (A group can be both a permission and workflow group.) **Permission:** Select this group type if you are going to restrict group members' access to certain Admin Center functions. **Public:** Select this group type if you are going to support the use of Public Users and wish to make certain that no permissions can be inadvertently applied to the group. This will disable all other group options. See *Appendix N* for further details. **Eligible for Workflow:** Select one or more workflow group types if users in this group will be performing the workflow functions listed. **Providers:** Select this option if members of this group will be responsible for creating/editing content. **Approvers:** Select this option if members of this group will be responsible for approving content. **Monitors:** Select this option if members of this group will be responsible for monitoring content changes. **Page Owner:** (This option is only visible if set in the Global System Variables.) Select this option to create a group of users that will be assigned as page owners throughout a sign. When used in combination with page owner template tag, page owner contact information is displayed on published pages. **Personalization:** select this option for groups that will access restricted areas of your website(s). Check the option Make available for External Applications and PageTypes if you want the group to be available in Custom Group questions on Application Forms. For more information on Personalization, see *Appendix F*.

4. Click **Save**.

5. Complete the information on each of the tabs. You can save the group at any time during the following steps; you will leave the **Edit Group** page and return to the **Group Manager**.

**Note** The next settings will only be displayed when you are working with a group that is eligible for workflow (approver, provider or system administrator). See the *System Information* section in this guide for more information on registering HTML editors for use in the ACM.

**HTML Editor:** Check one or more boxes of the editor types you want to make available to this group. This setting will determine the editors a user can choose from on their own —My Page|| settings.

If a user has no HTML editor rights due to belonging to groups where no editors are selected, the only available option in their —My Page|| settings will be the read-only editor. This view will display the content entered on a page without any capacity for the viewer to change or otherwise adjust what is shown. If a user has the editor on their —My Page|| set to a value that they no longer have rights to (either due to deselecting of the editor in the group settings, or due to the user's removal from a group), they will instead have the read-only editor selected.

### **Members Tab**

Assign users to the group.

1. Open the **Group Manager**.
2. Add or edit the group you want to select users for.
3. Click on the **Members** tab
4. Use the **Add Members** area to search for or list Users to add to the group.
5. Click the **Check Box** to the left of the User Name(s) you want assigned to the group.
6. Click the **Add Selected** button to add the Users to the Group.

### ***Sites Tab***


Give group access to one or more of your websites. The default setting is access to all sites.

1. Open the **Group Manager**.
2. Add or edit the group you want to set site access for.
3. Click on the **Sites** tab.
4. If you want the group to have access to all sites, leave the **Available in all sites** checkbox checked. If you want the group to have access to some sites but not others, uncheck **Available in all sites** and select individual sites.

### ***Tools Tab***

Give group access to Admin Center Management areas.

1. Open the **Group Manager**.
2. Add or edit the group you want to set Admin Center access for.
3. Click on the **Tools** tab.
4. Check the box of each Management Tool you want the group to have access to.

 **Note** At a minimum, groups usually require the Admin Toolbar and My Page tools.

### ***User Domain Tab***

Set restrictions on User Manager Groups for any group permitted to manage users. The User Domain tab limits access to the User Accounts within the selected folder and its sub-folders.

1. Open the **Group Manager**.
2. Add or edit the group you want to set user access for.

3. Click on the **User Domain** tab.

4. Select the folder you want this group to have access to. Group members will be able to access only the users found in the selected folder.

### ***Asset Domain Tab***

Set restrictions on Provider Groups that can insert Digital Assets in to pages. The Asset Domain tab limits access to the digital assets within the selected folder and its sub-folders.

1. Open the **Group Manager**.

2. Add or edit the group you want to set Digital Asset folder access for.

3. Click on the **Asset Domain** tab.

4. Select the folder you want this group to have access to. Group members will be able to access only the Digital Assets in the selected folder.

5. Click **Save**.

### ***Pagelet Domain Tab***

Set restrictions on groups that have rights to insert Pagelets into pages. The Pagelet Domain tab limits access to pagelets within the selected folder and its sub-folders.

1. Open the **Group Manager**.

2. Add or edit the group you want to set Pagelet folder access for.

3. Click on the **Pagelets Domain** tab.

4. Select the folder you want this group to have access to.

### ***Page Types Tab***

Restrict group access (the ability to add to the site) selected Page Types.

1. Open the **Group Manager**.

2. Add or edit the group you want to set Page Type access for.

3. Click on the **Page Types** tab.

4. Select the page types you want this group to have access to.

5. For more information on Page Types, see *Appendix G*.

### ***r.a.d. Editor Tab***

- 📌 **Note** The Telerik r.a.d. editor is the default editor of the ACM software, therefore it is the only editor where this level of access can be restricted. This tab will only display if the r.a.d. editor is selected as one of the HTML editors available to the group.

Restrict group access to r.a.d Editor tools.

1. Open the **Group Manager**.
2. Add or edit the group you want to set r.a.d. editor tool access for.
3. Click on the **r.a.d. Editor** tab.
4. Select the tools you want this group to have access to.

### **Locate Group**

1. Open the **Group Manager**.
2. Enter a partial or full group name; select a folder using the **Choose a Folder** dropdown. Click **Search**. All groups matching the search term will be displayed. OR
3. Browse groups by selecting a folder using the **Choose a Folder** dropdown. All groups within the selected folder will be displayed.

- 📌 **Note** Groups marked with a —P|| have been flagged as Public Groups.

### **Modify Group**

1. Open the **Group Manager**.
2. Locate the group you want to modify.
3. Click **View Summary** for a group report of all of the characteristics of the group.
4. Modify the group as required.
5. Click **Save**.

### **Copy a Group**

When you need to create a new group and many of the settings will be the same as another group already in the system you can open an existing group record and copy it as a template for a new group record.

1. Open the **Group Manager**.
2. Open the **Group** to copy or create a new group and save.
3. Click **Save & Copy**. The original group record will be saved and closed and a new group record is opened. The new group will not be a permanent record until it is saved.
4. The group details will display a copied Group Name. You can save the new record as it is currently displayed, or enter the new name (if known).
5. The Group type, HTML Editor, and all other settings will remain the same as the original record.
6. Make any changes to the new group settings that may be required.
7. Click **Save** to close the record, or **Save & Copy** to create another group based on the same group settings.

#### **Delete Group**

1. Open the **Group Manager**.
2. Locate the group you want to delete.
3. Check the **Delete** box to the right of the Group(s) you want to delete. Click **Save**. OR Click the **Group Name** to view the group details. Click **Delete**.
4. Click **OK** in the confirmation dialog box.

**Tip** If you attempt to delete a group and the group has users assigned to it or the group is assigned to an active workflow (assigned to pages). You will receive a message warning of this fact and the group will not be deleted. You must first remove the users from the group, or remove the group from the workflow. You will then be able to delete the group. If the group you are removing from the workflow is the last group assigned to the workflow, you will need to add a group to the workflow before you will be permitted to delete the original group.