



Understanding Permissions



Permissions determine the areas and functionality of your CivicEngage[®] website an administrator user may access for the purposes of editing and updating content. There are three types of permission levels. Each member of your administrative staff that will have website editing responsibilities will need to be assigned to one of the following levels:

Author

- Can create content but cannot make it public on the website
- Must submit all work for approval
- Cannot delete or publish any content

Publisher

- Can create and publish content (items) to the website
- Can approve an author's work
- Cannot delete pages or categories

Owner

- Can create and publish content to the website
- Serves as a kind of mini-system administrator for a specific area of the website
- Cannot add or edit users outside of his/her assigned area



For Features:

*Note: Only Owners can edit the Staff Directory feature. System Administrators can be notified via e-mail when a category or page has been submitted. E-mails are sent to all System Administrators and can NOT be changed. By default, this feature is turned off. If you wish to have it turned on please let your trainer know.

AUTHOR	Categories	Needs Approval
	Items	Needs Approval
PUBLISHER	Categories	Needs Approval
	Items	Does NOT Need Approval
OWNER	Categories	Does NOT Need Approval
	Items	Does NOT Need Approval

For Pages:

AUTHOR	Needs Approval
PUBLISHER	Does NOT Need Approval
OWNER	Does NOT Need Approval Can Edit Properties and Add Feature Column



Steps for Permissions:

Step 1 – Set Up Groups

Create groups for teams or staff members that will have similar editing rights. For example, create groups of permissions just for those staff members with permission to edit your Police Department sub-page. For instance, you could create the following permission-based groups:

- Police – Author
- Police – Publisher
- Police – Owner

To create groups, go to Modules->Site Tools->Group Administration.

Note: Do not set anything at the Pages or Modules Tab within the Group Creation Screen.

Step 2 – Set Up Page-Specific Permissions

1. Go to your website's Home Page
2. Go to the Department's Page
3. Go to each Department's landing page

(Continuing with the Police Department example, you would navigate to the home page for the Police Department).

1. Go into Live Edit Mode
2. Go to the Properties Tab
3. Click on the Permissions Button at the top of the Properties Tab

From here, you should be able to see all established groups. Based on our Police Department example, you would:

1. Go to the Police Author group and place a checkmark next to "A"
2. Go to the Police Publisher group and place a check next to "P"
3. Go to the Police Owner group and place a check next to "O"
4. Go back up to the top of the group list (please make sure you are still on the correct landing page) and click the button labeled "SAVE AND PUSH DOWN"

Once saved, this page and all its subpages will allow each group the appropriate access.

*Do this for all departments. If you have specific pages with special permissions, you can set those by clicking the SAVE, rather than SAVE AND PUSH DOWN button.

Step 3 – Set Up Feature-Specific Permissions

1. Go to the *Modules* menu at the top of your administrative site
2. Open one of the listed features (Note: You must set permissions at the category level, not at the feature level)
3. Navigate into each category's properties to set permissions
4. Repeat steps two and three for each feature

Example: Still following our Police Department example, to set permissions for the FAQ feature, you would:

1. Go to the Police Category
2. Go to the Action drop-down menu and choose Modify or Properties—you will see a permission set in the category properties
3. Go to the Police Author group and place a checkmark next to "A"
4. Go to the Police Publisher group and place a check next to "P"
5. Go to the Police Owner group and place a check next to "O"

Do this for every category for every feature in the *Module* menu.

*If you have a feature that only needs to be accessed by one department, and all members of the department need access to all its categories, you can assign permissions at the module level by clicking the *Properties* tab at the top of each module. An example of this scenario would if only your human resource staff members need access to the Jobs feature.

Step 4 – Set Up User-Specific Permissions

1. Navigate to Modules->Site Tools->User Administration
2. Add the user
3. Assign them to the correct group
4. Click save

If you ever need assistance with permissions after your initial training, visit our Help Center or email our team of support specialists at civicengage@civicplus.help.



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