

web2growCMS

flexible content management from web2grow

version 1.3

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Contents

1	Who Should Read This?	1
2	The terminology of web2growCMS	2
3	Introduction to the web2growCMS Manager	3
3.1	Logging On to the Manager	3
3.2	Introduction to the Manager	3
3.3	What is the document tree?	4
3.4	Are there any shortcuts?	4
4	Uploading content	4
4.1	Upload files and images with File Manager	5
5	Locating content (search)	5
6	Editing webpages	6
6.1	How do I preview on the live site?	6
6.2	Editing an Existing Document	6
6.3	Editing the document's content	6
7	Creating a new webpage	7
7.1	To create a new webpage:	7
7.2	What is the difference between a New document and a New folder?	8
8	Publishing a page	8
8.1	To publish a new webpage:	9
9	Moving a webpage (document)	9
9.1	Method 1:	9
9.2	Method 2:	10
9.3	How do I move a page to the top level?	10
10	Setting the template	10
11	Using the WYSIWYG Editor	11
12	FAQ	13
12.1	Can I copy directly from Word?	13
12.2	How do I use heading styles in the WYSIWYG editor?	13
12.3	How do I format text in the html editor?	13
12.4	How do I insert images?	14
12.5	Can I insert any image [TIPS]?	15
12.6	How do I insert a link?	15

12.7	How do I insert links to PDF documents?	18
13	Managing backend users	19
13.1	Why manager users, roles and groups?	19
13.2	Before You Begin	20
13.3	The Pieces	20
13.4	Roles	21
13.5	Document Groups	22
13.6	User Groups	23
13.7	Important Note	25
13.8	User groups->Document groups	25
14	Secure area using web users and web groups	25
14.1	Introduction to secure areas	25
14.2	Creating a Web User Group and Document Group	27
14.3	Creating a Web User Account	29
14.4	Setting up the login snippet	30
15	Taking Your Site Offline	31

1 Who Should Read This?

This guide is designed to assist editors in using a web2growCMS website.

Sections 1 – 13 are designed for content contributors. They explain how to create, edit and move pages, and how to insert and format content and images in your website.

Sections 14 + cover more advanced topics. In particular, how to managed backend users, and how to create secure areas on your website.

In preparing this guide we have presumed that your web developer has already configured the basic setup for your website.

Accordingly, we deal with the basic administration issues you are likely to face in the order in which they are likely to occur.

2 The terminology of web2growCMS

web2growCMS is a very flexible web content management system. It can be configured in a variety of ways.

web2growCMS introduces some new terminology, which we explain here.

As an editor there are two ways to publish content:

- ∞ in the main **Content Area**, and
- ∞ in other areas called **Template Variables** (traditionally side blocks, but they can be placed anywhere on the webpage).

There are two other important feature of web2growCMS that you need know about:

- ∞ **Chunks** - these are re-usable pieces of HTML content. You can place a Chunk in the main content area or in a template variable. For example, you could put your contact details into a Chunk and then you can publish them in different places on the your website without re-typing the details.
- ∞ **Snippets** - these are small functional items, such as menus and search bars. These can be published in the template, a document's main content area, a chunk or in a template variable.

A Chunk or Snippet can be placed directly into the template by your web developer, or inserted by you into the Content Area or a Template Variable.

This is how it all fits together:



- ∞ The template contains the main framework of the webpage. Your web developer may choose to have content that appears on every page in the site. In this example the header and logo are fixed in the template.
- ∞ The template contains the Content Area, identified in pink, and inserted into the template with the syntax [*content*]. This content is taken from the Document as edited in the Manager.

- ∞ The template also contains web2growCMS tags that insert Snippets. In this example there are two menu Snippets, identified in blue and inserted with the following syntax `[[SnippetName]]`
- ∞ The template contains Template Variables that allow the Editor to insert text, images and other content items outside of the main Content Area. These are identified in green and are inserted in the template with the following syntax `[*TemplateName*]`
- ∞ The Editor can insert pre-set pieces of text or html into the Content Area or a Template Variable by using Chunks. In this example there are two Chunks identified in red. Chunks are inserted by the editor by typing into the Content Area or a Template Variable space.

3 Introduction to the web2growCMS Manager

3.1 Logging On to the Manager

To login to your site's Manager:

- ∞ Go to your website, by entering your domain name then “/manager/” eg `www.yourdomain.com/manager/`
- ∞ Enter your username and password to login to your website's administration page.

To logout:

- ∞ In the Admin Menu click on Logout.

3.2 Introduction to the Manager

The Manager area is divided into 3 panels

- ∞ Top left: Admin Menus
- ∞ Bottom left: Document tree
- ∞ Right: Editing area



You can resize the left-hand panels, by dragging the middle bar up or down. [The layout can also be configured differently by the site administrator]

3.3 What is the document tree?

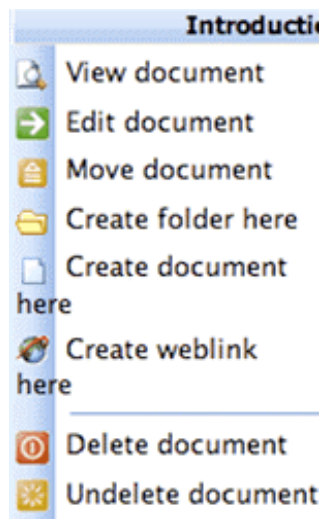
This is a list of all the pages in the website, arranged in a hierarchical order. This is where you select the pages you want to edit, move or delete.

You can use the **document tree icons** to perform actions on the tree.



3.4 Are there any shortcuts?

Yes. You can right-click on a document's name in the Document Tree to see the the Right Click Menu. The Right Click Menu gives you additional shortcuts.



- ∞ You can create **documents**, **folders** and **weblinks** in an existing Folder, by right-clicking on the Folder and selecting one of the Create... items in the list. This saves time moving the item from the first level after you have created it.
- ∞ You can go directly to the Edit page of a document, without having to open the document first.

4 Uploading content

You can upload content (eg PDF files and image files) using FTP or the web2growCMS inbuilt **File Manager**. Images can also be uploaded using the Image icon on the document editor toolbar.

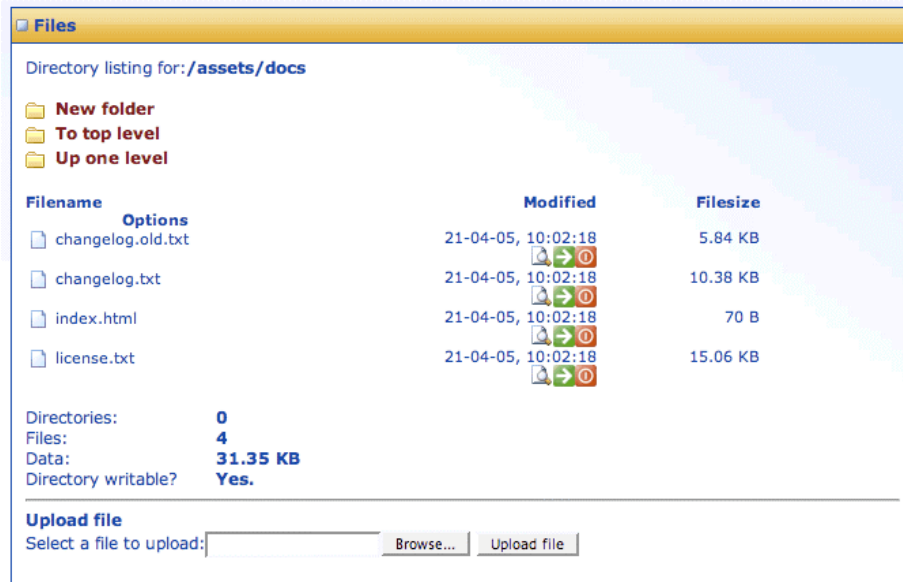
If you are using FTP, you should transfer files to the appropriate folder in the **/assets** folder. For example:

- ∞ Transfer images to the **/assets/images** folder.
- ∞ Transfer pdf and text files to the **/assets/files** folder.

4.1 Upload files and images with File Manager

To upload files and images:


- ∞ Click on **Manage Files** in the Admin menu. The File manager will open.

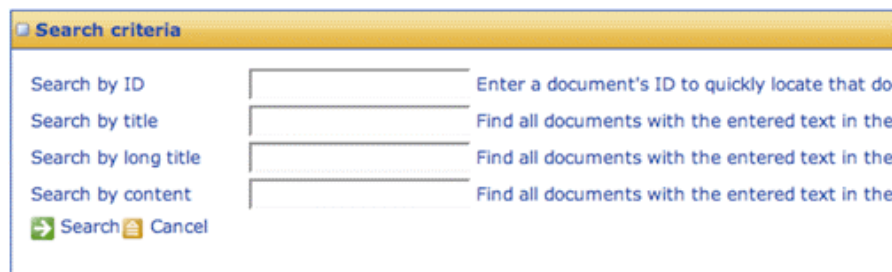


- ∞ Click on **Browse** to locate your file on your local PC, then click **Upload file**. You must upload PDFs to the assets/files folder if you want to use easy-linking in the system.

5 Locating content (search)

In a small website it will be easy to locate content by browsing through the document tree.

In a larger site you can search for the web page. Click on  in the document tree icons, and the following search box will appear.



Search criteria

Search by ID Enter a document's ID to quickly locate that do

Search by title Find all documents with the entered text in the

Search by long title Find all documents with the entered text in the

Search by content Find all documents with the entered text in the

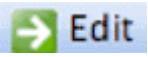
Here are some tips:


- ∞ You may be able to identify the id of the item in the url on the front end of the website eg. www.web2grow/index.php?id=1
- ∞ If you have Search Engine Friendly URLs enabled you will not see the ID. Instead you can search by the title. This will appear in the title section of your browser (in Internet Explorer this is in the blue window bar).

- ∞ Finally you can always search the page content.

6 Editing webpages

To update existing content on the site you need to:

- ∞ Locate the web page (called a document) in the document tree.
- ∞ Click on the document's name, or right-click and select "Edit document"
- ∞ Open the page to edit .
- ∞ Edit the page with the WYSIWYG editor.

- ∞ Save the page .

- ∞ Check in the Preview.

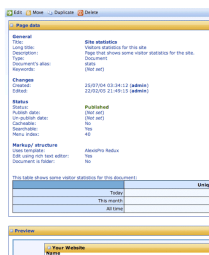
6.1 How do I preview on the live site?

Click on **Launch Site** on the Admin menu.


Or keep a webpage with the live site open in another window or browser tab. Then you can just refresh the page to view any changes. In Internet Explorer use **CTRL + F5** if the menus don't appear correctly, or new content is not showing. If you are still having problems viewing new content, clear the server cache, by clicking on **Refresh Site** in the Admin menu.

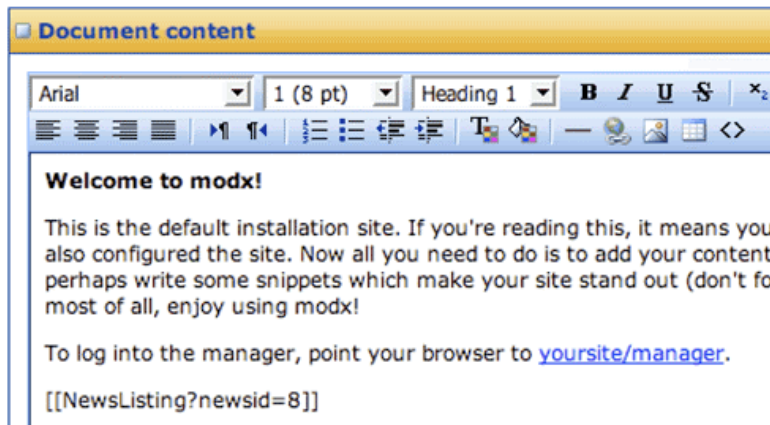
6.2 Editing an Existing Document

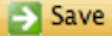
Click on the document in the document tree. A page summary will appear in the right hand panel. You will also see a Preview of the page so you can check that you have found the correct page.



6.3 Editing the document's content

Click on  in the Action icons. You can now use the WYSIWYG editor to edit the page content.



Once you have finished click  Save.


7 Creating a new webpage

To add new content on the site you need to:

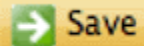
- ∞ Create a new Document.
- ∞ Publish the Document.
- ∞ Move the Document to the correct location in the Document Tree.

7.1 To create a new webpage:

- ∞ In the Admin menu click on **New document**
- ∞ Fill in the fields in the Document Settings and add your content.
- ∞ In the General tab of the Document Settings panel, select the location of the document by clicking on the **Document parent** folder icon, then click in any document in the document tree.
- ∞ The parent will be displayed in the Document parent field.

General	Page Settings	META Keywords	Snippets	Preview
Title	examples			?
Long title	example newsletters			?
Description				?
Document's alias				?
Summary				?
Uses template	RQDefault			?
Menu title				?
Menu index	2		< > ?	?
	Show in menu <input checked="" type="checkbox"/>			?
Document parent	 6 (Examples) <small>Click on the above folder icon to enable (or disable) parent selection then click a document in the tree to set it as this document's parent.</small>			

∞ Note: If you right-clicked in the Document Tree to create the document, the document will be created in the Folder on which you right-clicked.

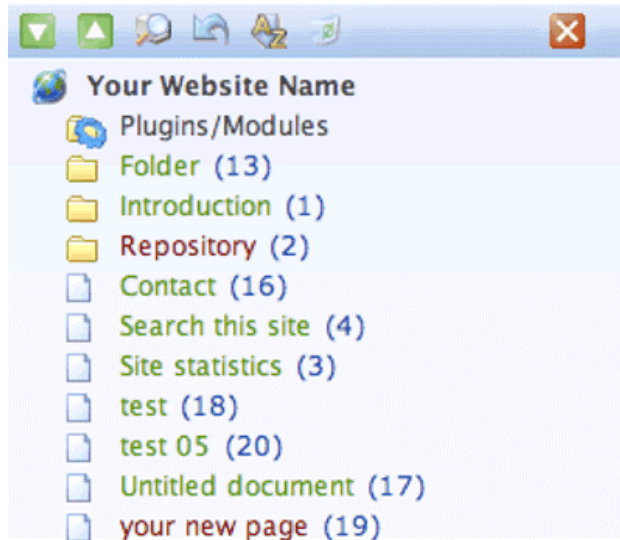
∞ Click  to save the content.

7.2 What is the difference between a New document and a New folder?

If you create a new Folder, you can immediately start moving documents to it. However you can convert a document to a folder at any time, by moving a document or folder to the document.

8 Publishing a page

When you create a new document it may be un-published (ie. cannot be viewed on the front end of the website) by default. [Check with your administrator]. If the document is unpublished it will appear in the document tree in red, indicating that it is not yet published.



8.1 To publish a new webpage:

- ∞ Click on the unpublished page in the document tree, and Edit.
- ∞ Click on the Page Settings tab.
- ∞ Tick the Publish button (or set a date to publish) and Save.


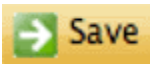
General	Page Settings	META Keywords	Snippets	Preview
Folder?	<input type="checkbox"/>	?		
Rich text?	<input checked="" type="checkbox"/>	?		
Log visits	<input checked="" type="checkbox"/>	?		
Published?	<input checked="" type="checkbox"/>	?		
Publish date	<input type="text" value="(not set)"/>	?	<input type="button" value="15"/> <input type="button" value="15"/>	
Un-publish date	<input type="text" value="(not set)"/>	?	<input type="button" value="15"/> <input type="button" value="15"/>	
Searchable	<input checked="" type="checkbox"/>	?		
Cacheable	<input checked="" type="checkbox"/>	?		
Empty cache?	<input checked="" type="checkbox"/>	?		
Content Type	<input type="text" value="text/html"/>	?		
Content Disposition	<input type="text" value="Inline"/>	?		

- ∞ The document will now appear green in the document tree.

9 Moving a webpage (document)

9.1 Method 1:


- ∞ Click on the webpage in the document tree.

- ∞ Click on  in the Action icons.
- ∞ In the document tree, select a Folder or webpage to move the page to.
- ∞ Click on  in the Action icons.

9.2 Method 2:

- ∞ Open the document, and go to the General tab.

General	Page Settings	META Keywords	Snippets	Preview
Title	<input type="text" value="examples"/>	<input data-bbox="1125 721 1157 766" type="button" value="?"/>		
Long title	<input type="text" value="example newsletters"/>	<input data-bbox="1125 772 1157 817" type="button" value="?"/>		
Description	<input type="text"/>	<input data-bbox="1125 824 1157 869" type="button" value="?"/>		
Document's alias	<input type="text"/>	<input data-bbox="1125 875 1157 920" type="button" value="?"/>		
Summary	<input type="text"/>	<input data-bbox="1125 927 1157 972" type="button" value="?"/>		
Uses template	<input type="text" value="RQDefault"/>	<input data-bbox="1125 978 1157 1023" type="button" value="?"/>		
Menu title	<input type="text"/>	<input data-bbox="1125 1030 1157 1075" type="button" value="?"/>		
Menu index	<input type="text" value="2"/> <input type="button" value="<"/> <input type="button" value=">"/> <input data-bbox="710 1153 742 1198" type="button" value="?"/>		Show in menu <input checked="" type="checkbox"/>	<input data-bbox="1125 1153 1157 1198" type="button" value="?"/>
Document parent	<input type="button" value="6 (Examples)"/> <p>Click on the above folder icon to enable (or disable) parent selection then click a document in the tree to set it as this document's parent.</p>			

- ∞ Click on the **Document parent** folder icon.
- ∞ In the document tree, select a Folder or webpage to move the page to.
- ∞ Click on  in the Action icons.

9.3 How do I move a page to the top level?

To move a webpage to the top level select the Site name at the top of the Tree as the Parent.


10 Setting the template

After you create a web page, check that the correct template is attached.

- ∞ Open the document, and go to the General tab.

General	Page Settings	META Keywords	Snippets	Preview
Title	<input type="text" value="examples"/>			?
Long title	<input type="text" value="example newsletters"/>			?
Description	<input type="text"/>			?
Document's alias	<input type="text"/>			?
Summary	<input type="text"/>			?
Uses template	RQDefault			?
Menu title	<input type="text"/>			?
Menu index	2 <input type="button" value="←"/> <input type="button" value="→"/> ?			Show in menu <input checked="" type="checkbox"/> ?
Document parent	<input type="button" value="6 (Examples)"/> <small>Click on the above folder icon to enable (or disable) parent selection then click a document in the tree to set it as this document's parent.</small>			

∞ Select the template in the dropdown menu.

∞ Click on  in the Action icons.

11 Using the WYSIWYG Editor

The editor is similar to using Word. However there are a few crucial things to remember when working with an HTML editor online.

- ∞ **Save your work often!** You WILL remember to do this after you have lost a substantial amount of formatted text, because the admin area has timed-out or your internet connection drops.
- ∞ **Don't copy and paste from MS Word.** First copy any text to Notepad or another plain-text editor, then copy the text into the editor.

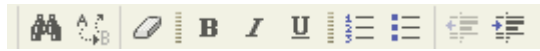
There are a number of buttons on the editor's toolbar. Depending on your site configuration, you may see more or fewer buttons on your editor's toolbar.

Roll your mouse over the icons to see tooltips. We provide some tips below.



- ∞ **Source** - view and edit the html source code.
- ∞ **Preview** - of limited use in web2growCMS.
- ∞ **Templates** - your web developer will advise you if these are to be used. In most cases, it will be more effective to use separate page Templates and Template Variables in web2growCMS.
- ∞ **Cut, Copy, Paste** - you can also use standard keyboard shortcuts.

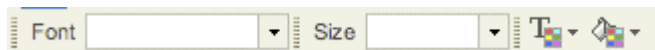
- ∞ **Paste from MS Word** - If you **must** copy from MS Word, use this.



- ∞ **Find, Replace** - self-explanatory.
- ∞ **Remove Format** - can be a little inconsistent. For example, if you have applied a format over a heading style, then the Remove Format button does not work. You have to toggle the style to normal and then toggle back again. Sometimes you may have to turn on Source to remove excess format tags.
- ∞ **Bold, Italic, Underline** - all self-explanatory. Try to avoid underlining your content, as your visitors will presume that the underlined text is a link.
- ∞ **Lists: number and unordered** - are powerful and useful tools for formatting content. These should be styled by your web developer using CSS .
- ∞ **Indent and Outdent** - are useful for positioning text such as quotes, or positioning images off the margins. Make sure that you Preview the changes, as in some designs Indenting text may have unforeseen consequences on other aspect of the design.



- ∞ Text justification - these should be used sparingly. In most cases your web designer will have made conscious choices about the text justification that are reflected in the CSS styles available in the **Format** and **Styles** dropdown.
- ∞ **Links** - used to insert internal and external links (see FAQ below).
- ∞ **Images** - used to upload and insert images (see FAQ below).
- ∞ **Tables** - used to insert and modify tables (see FAQs below).
- ∞ **Horizontal Rule** - insert a horizontal rule. These can be styled by your web designer using CSS.
- ∞ **Special characters** - insert special characters like © and ™.




- ∞ If your web designer has effectively used CSS you should be able to avoid this row altogether. If possible you should limit yourself to using the Format and Styles dropdowns for formatting text. **Why?** Because the Format and Styles dropdowns use CSS to style the text, so if you need to change your site design later, it is easy to update. If you apply line-by-line formatting then these can only be updated by manually changing the styles in each page.
- ∞ **Font** - avoid changing the fonts as you will lose consistent design in your site.
- ∞ **Font size** - avoid applying sizes to your fonts. Instead use the pre-defined Format and Style menus. **Why?** The editor applies fonts using html font tags, which may not correspond with the font system used by your web designer in CSS.

- ∞ **Text colour, background colour** - avoid using these. If you do, make sure you know the exact reference for your site's style guide. Type the colour reference instead of relying on the colour picker. Slight changes in colour on a site can ruin the design.

12 FAQ

12.1 Can I copy directly from Word?

NO. This is the most common mistake with editing. Always copy text from Word into Notepad before copying into the html editor. **Very important!** After you have pasted from Notepad, you can remove any linebreaks by using Delete on the previous line. If you do paste from Word, use the  button.

12.2 How do I use heading styles in the WYSIWYG editor?

You should use the Format dropdown to style your text.



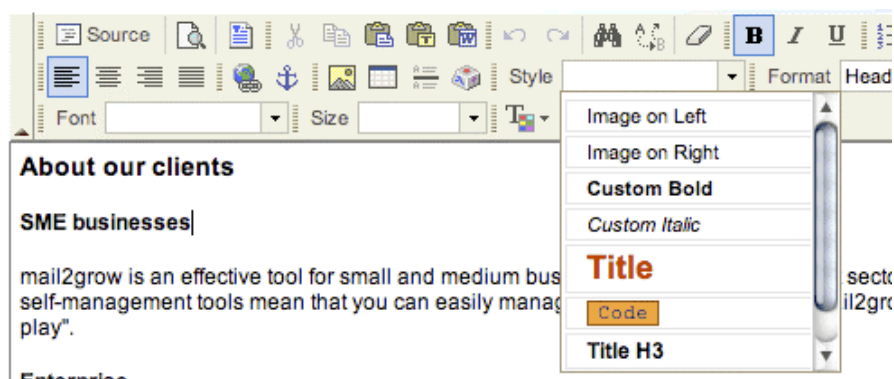
- ∞ Select the text you want to style.
- ∞ Select the style you want to apply from the style dropdown.
- ∞ To reset to standard text, select Normal. If a style is not changing, try toggling it to another style and back again.

12.3 How do I format text in the html editor?

We recommend that you primarily use the heading styles set by your web developer (see previous FAQ).

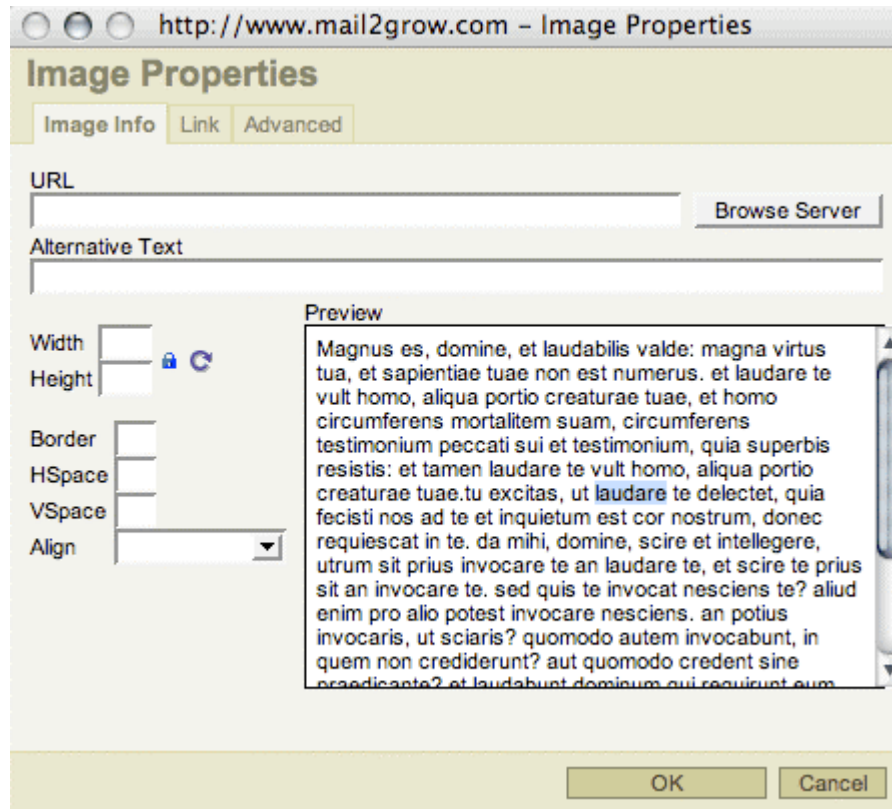
However there is another dropdown your web developer may configure for you to use. Whereas Format is applied to a whole block of text (like paragraph formats in Word) a style can be applied to a single word, image or any content item. To apply a style:

- ∞ Select the text you want to style.
- ∞ Select the style you want to apply from the style dropdown.

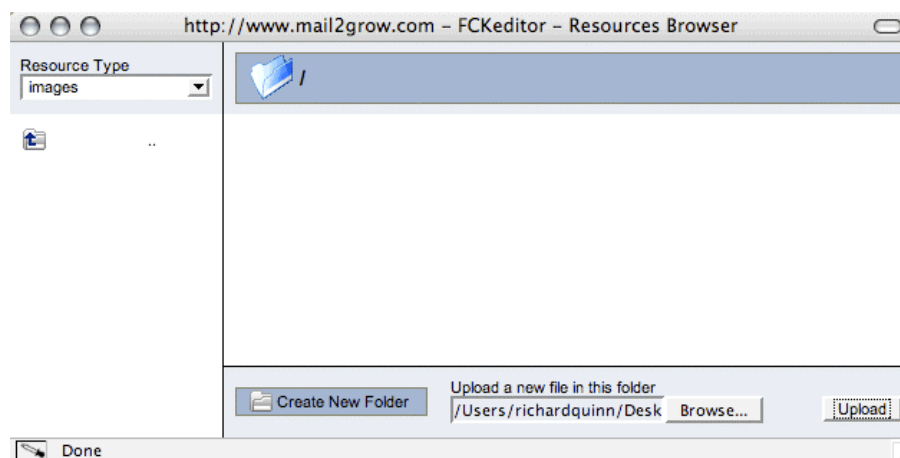


12.4 How do I insert images?

- ∞ Click on 



- ∞ Click the Browse Server Button, then select the image you want to insert, type the ALT tag and click OK.
- ∞ If you need to upload at the same time, then click Upload first and select the image to upload (ensure it is .gif, .jpg, or .png and optimised for the web) (see tips below)



- ∞ OK.


12.5 Can I insert any image [TIPS]?

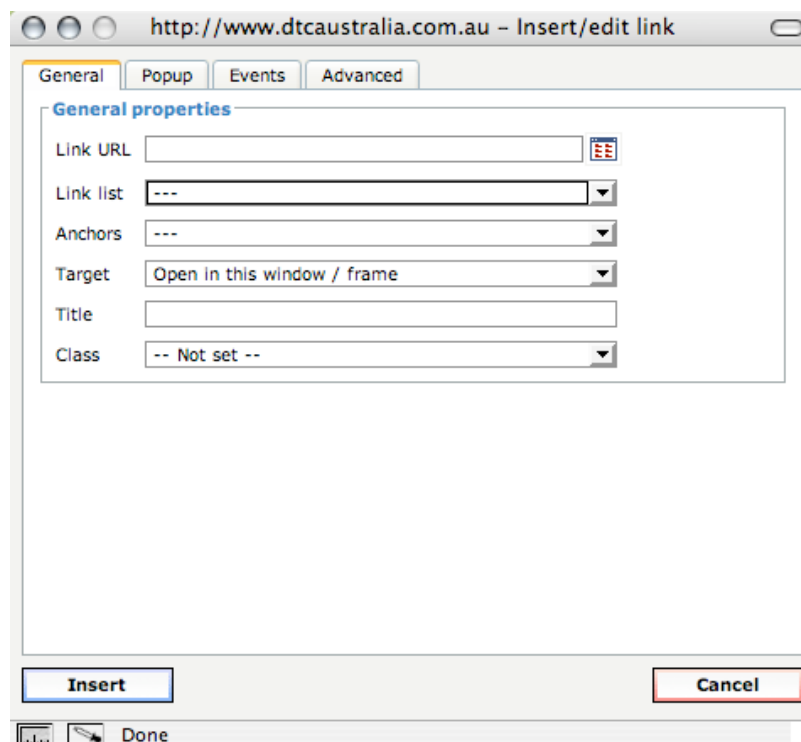
You can only use PNG, GIF or JPG images in a web page.

- ∞ You can use most photo-editing software to convert TIF or BMP images to JPG or GIF. You can even use the very basic **Paint** program in Windows to **save as** JPG or GIF format.
- ∞ Check that the JPG or GIF images are not too large. You can see the size in the image editor. You should look for the width dimensions in pixels (px).
- ∞ If you have multiple images on a page eg. product images, they should be the same width for design consistency. This should not be more than 300px, and in most cases would be between 100-200px. Ask your web developer for the standard image size for your website.
- ∞ Most image optimizers do not work with PDF files. For best results, without a PDF-exporter application (ie Adobe Acrobat NOT Reader), you can take a JPG screen shot of the image in the PDF document. You can use the free screen capture software at wisdom-soft.com, or try SnapNDrag from yellowmug.com for OS X.

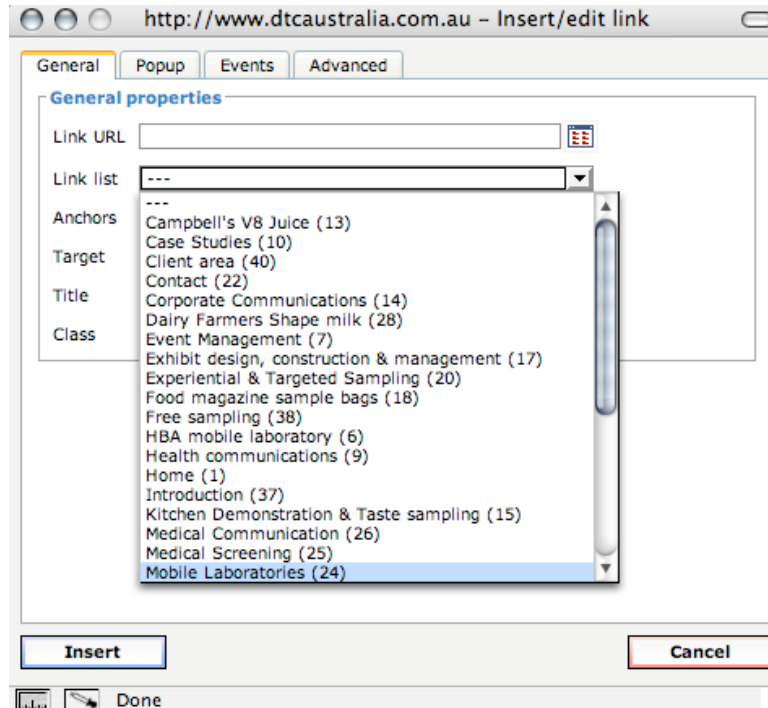
12.6 How do I insert a link?

To insert a link in a document:

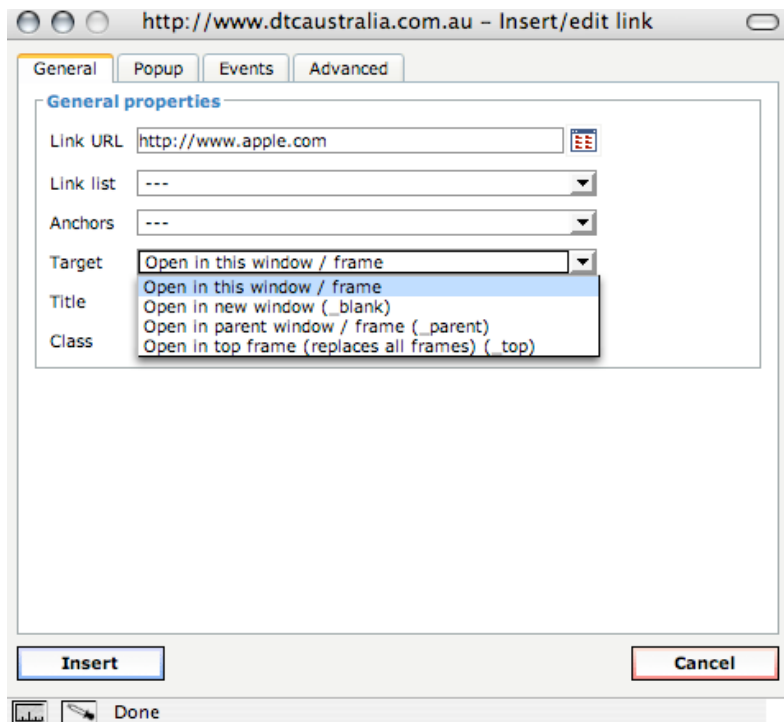
- ∞ Select the text or image that you want to link from.
- ∞ Click on 
- ∞ The following dialog appears



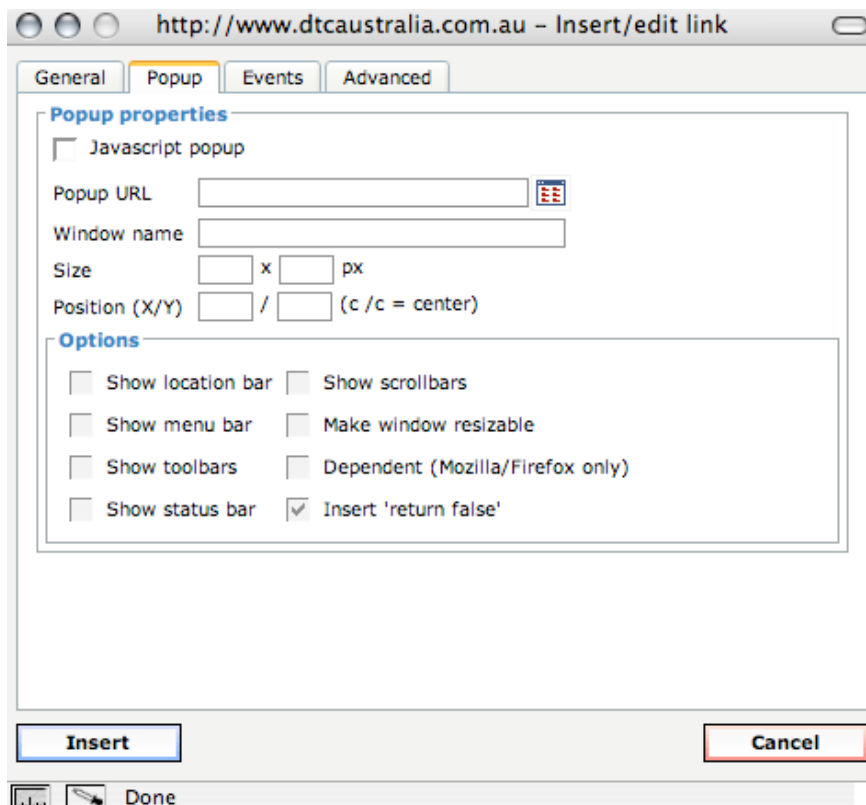
- ∞ To link externally just type the URL for the site into the URL box.
- ∞ To link to an internal page select the page in the Link list dropdown.



- ∞ web2growCMS also has a special tag to use for referring to internal documents. It takes the form [~xx~], where xx is the ID of the document you wish to link to. This can also be combined with other web2growCMS tags. For example, to create a link to your home page: `Home`
- ∞ After you click OK, the link will appear in the content editor as blue underline text. However on the front-end of the website the links will styled in CSS by your web developer.
- ∞ If you want the link to appear in a new window you can set the target as "_blank"




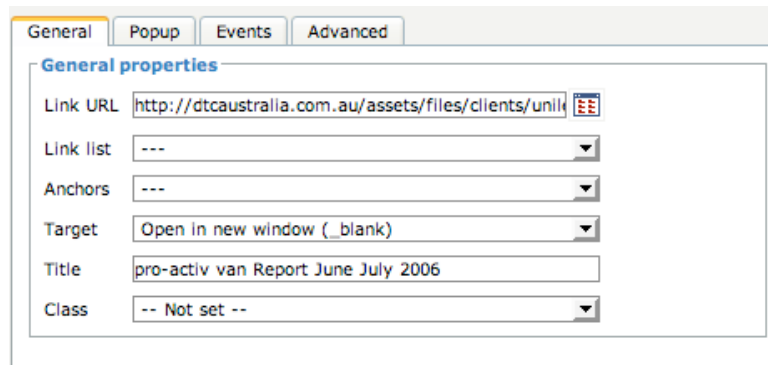
- ∞ Your web developer can use css classes to apply styles to an image including borders, padding, and positioning (eg. right hand floating). You can apply classes, if provided, by typing the class directly into the “Class” field.
- ∞ You can also create a javascript popup:



12.7 How do I insert links to PDF documents?


Before you can insert a PDF document, it must first have been uploaded to the **assets/files** folder, and you will need to know the path to where it was uploaded. Uploading and other file management procedures is beyond the scope of this document; check the Administrator's Guide for more information.

- ∞ Select the text that you want to link from. We recommend that you always put the .pdf extension on the end so that user will know that the link leads to a PDF document, not another page. (eg. Policies.pdf)
- ∞ Click on the  icon, then type a link to the PDF file' location on your web server, eg. /assets/files/policies.pdf OR click on the icon next to the Link URL and



General | Popup | Events | Advanced

General properties

Link URL: 

Link list:

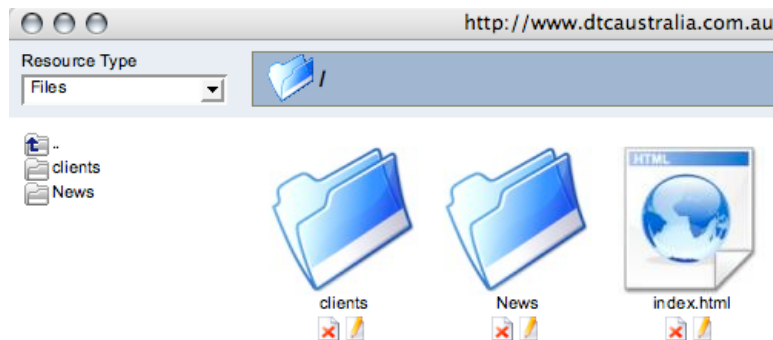
Anchors:

Target:

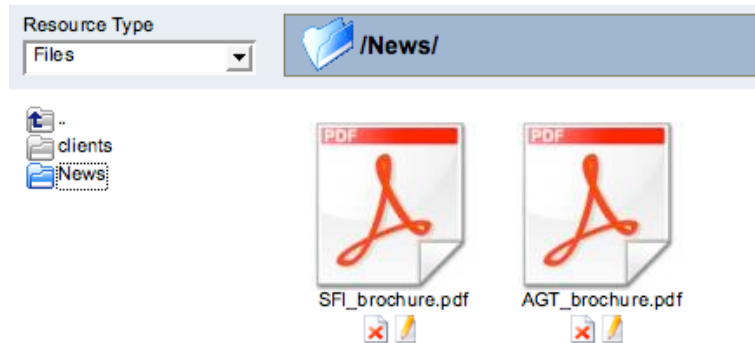
Title:

Class:

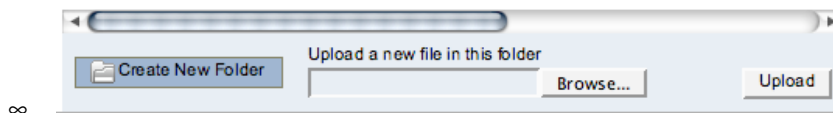
- ∞ Browse to the directory where the PDF is located (if any).



- ∞ Click on the file icon to insert



- ∞ Note: You can ONLY see the PDFs if they are in the assets/files folder or any folder inside that folder.
- ∞ If you haven't already uploaded the PDF you can use the Upload function in the file manager to Upload. Once uploaded click on the file icon to insert.



13 Managing backend users

13.1 Why manager users, roles and groups?

The primary reason for setting up manager users and groups is to be able to control access to the documents in the Document Tree. Manager users are stored separately from web (front-end) users for security reasons. A web user cannot log into the back-end nor can a Manager user log into the web site (front-end).

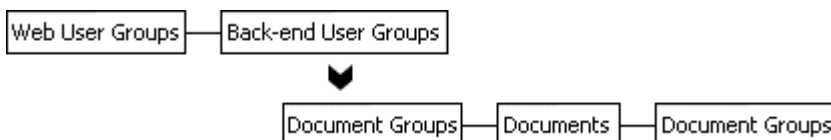
Manager Roles are also used to control access to system management functions.

Each Manager user is assigned a Role that controls what permissions he is granted in areas of system and user administration and document management. A Manager user can only be assigned one Role.

Manager users are assigned to one or more manager user groups:

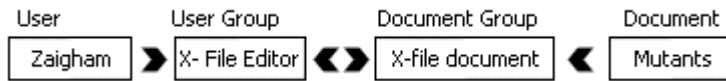


Both "Manager User Groups" and "Web User Groups" can be assigned to the same "Document Group."



Example:

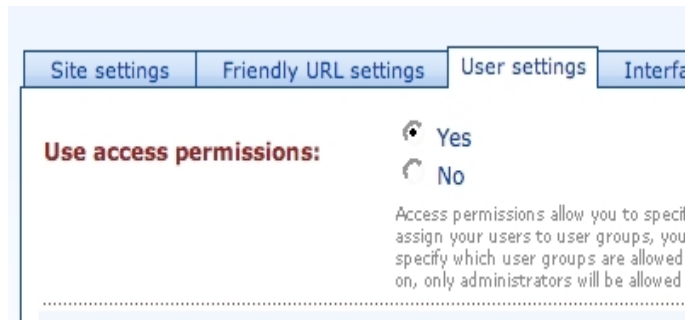
From the Manager (Back-end):



Using Manager Roles, Document Groups, and Manager User Groups you can control every aspect of the management of your web2growCMS site.

13.2 Before You Begin

Make sure that "Use access permissions" is set to Yes in the User Settings tab of System Configuration.



13.3 The Pieces

Permissions in web2growCMS are composed of many parts that all work together. At first, it can be a little confusing as to what all the parts are, what they do, and how they interact. For that reason, each part will be explained below, followed by an example:

- ∞ **Document** – The fundamental element (a “page”) in web2growCMS. Each document is assigned to one or more document groups.
- ∞ **Document group** – As it sounds. A group of documents that for some reason are placed in the same group. A common example of this would be the main sections of a site (such as Products, Portfolio, or Services). A document group can be connected with one or more user groups.
- ∞ **User** – The user piece contains information about the specific user such as name, password, etc. The user piece does NOT define the permissions. Permissions are defined in the role. Each user can be assigned to one or more user groups, but can only be assigned to one role.
- ∞ **Role** – As just mentioned, the role is the piece that defines the permission of any user who is assigned that role.
- ∞ **User group** – A collection of users who will need access to the same document groups. A user group can be connected to one or more document groups.

So how do all these work together? Roles determine what a user has permission to do, and user groups combined with document groups determine what documents a user can work with. An example will probably be the most effective way to demonstrate this.

Suppose you have a site to distribute the software your company writes. You also want to have a discussion and help forum. You decide that your site will look like this:

- ∞ Home

- ∞ News
- ∞ Products
 - Games
 - Graphics Utilities
 - Project Management
- ∞ Support
 - FAQ
 - Forums
 - Contact Us
 - Live Support Chat
- ∞ About Us
 - Our history
 - Our philosophy
 - Our people

13.4 Roles

First, you decide you will need these Roles:

- ∞ **Site administrators** - will manage users and general site configuration.
- ∞ **Developers** - will create the code used in special applications, such as the Live Support Chat feature. Will handle modules, plug-ins, snippets, and TVs
- ∞ **Designers** - will be responsible for the overall look and layout of the site's pages. Will work with templates, chunks, and CSS.
- ∞ **Content editors** - will be responsible for the content of the pages. Will work with documents.
- ∞ **Proofreaders** - will be able to edit, but not create or delete documents.

Create/ edit role

Role name:

Description:

Content management

- View a document's data
- Create new documents
- Edit a document
- Save documents
- Delete documents
- Edit document META tags and keywords
- Empty the site's cache

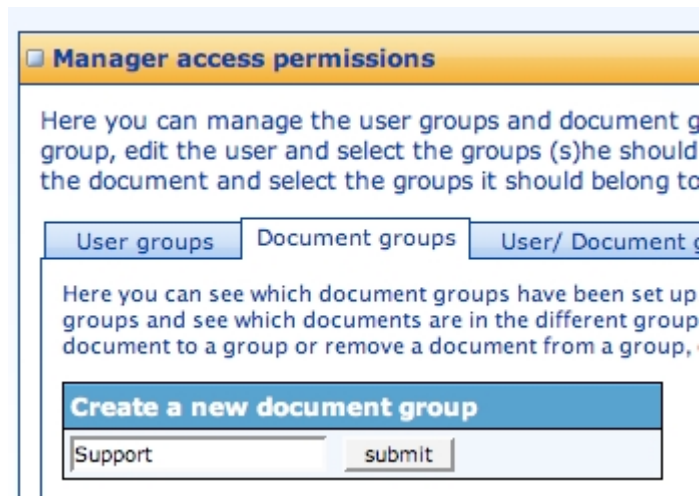
Template management

- Create new site templates
- Edit site templates
- Save templates
- Delete templates

13.5 Document Groups

Next, consider how the documents in your site will be grouped.

- ∞ **Corporate** - pages referring to the company in general, such as the About Us pages and the Home page.
- ∞ **Product** - pages dealing with individual products.
- ∞ **Support** - pages that contain FAQ lists or company contact information.



13.6 User Groups

Then you begin to organize the User groups your content editor users will belong to.

- ∞ **Marketing** - will handle Corporate pages; anything that will effect the public's perception of the company and its products.
- ∞ **Products** - will work with the pages relevant to the company's products.
- ∞ **Support** - will take care of the support pages.
- ∞ **Proofreaders** - will have access to all documents (but is limited in what he can do with them by the permissions granted by his Role).

Manager access permissions

Here you can manage the user groups and document groups, edit the user and select the groups (s)he should belong to the document and select the groups it should belong to.

User groups | Document groups | User/ Document groups

Here you can see which user groups have been set up. You can see which users are members of the different groups. To add a user directly. Administrators (users who have been assigned so they don't need to be added to any groups).

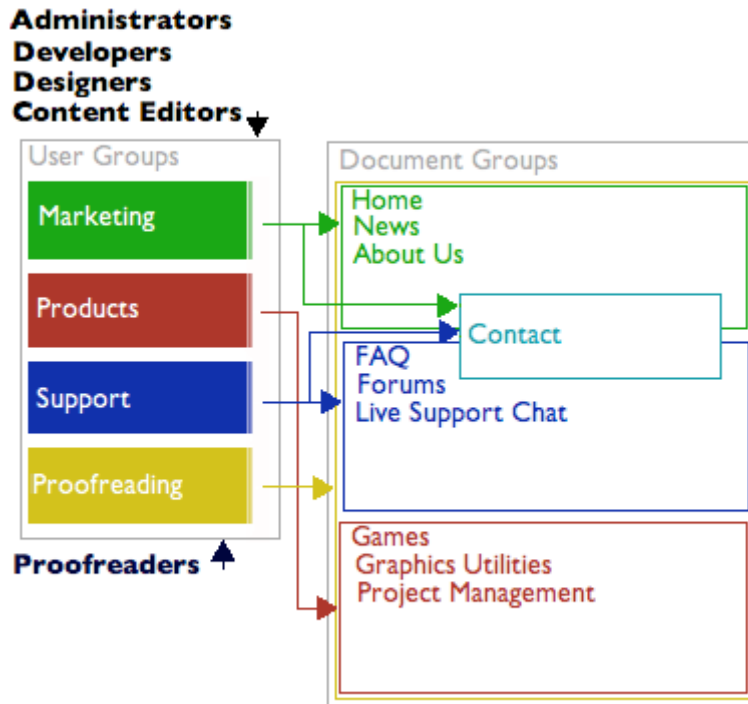
Create a new user group

Support

User groups

Marketing
» Users in group: None.
Products
» Users in group: None.

Here is how the user groups and documents groups will interact.



13.7 Important Note

A user can belong to any number of User Groups, but he can be assigned to only one Role. For example, if you want one of the Proofreader users to also be a Support document editor, you will have to create a different User for him to log in as, and assign that user to the Support user group.

Remember, Roles assign permissions - WHAT the user can do. User groups assign WHICH DOCUMENTS the user can work with, but he can only do what the role he was assigned to allows.

13.8 User groups->Document groups

Now we need to connect the user groups to the document groups we want them to have access to. For example, the Proofreaders user groups will be connected to ALL of the document groups, since his job will be to correct errors in all documents. The Marketing user group should have access to the Corporate and the Support document groups. And of course the Product user group should be connected to the Product document group.

14 Secure area using web users and web groups

14.1 Introduction to secure areas

You can use web users and web groups to create secure access to selected pages on the web.

Users on the web are stored separately and apart from manager (back-end) users for security reasons. A web user cannot log into the back-end nor can a back-end user log into the web site (front-end). You would have to use separate accounts to do this.

Here's how it works:

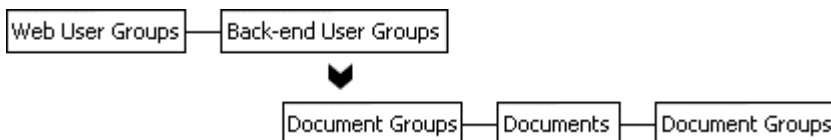
Back-end users are assigned to back-end user groups:



Web users are assigned to web groups:



Both "Back-end User Groups" and "Web User Groups" can be assigned to the same "Document Group."

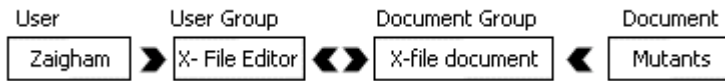


Example:

From the Web (Front-end):



From the Manager (Back-end):



Note: A document is flagged as private whenever the document group that it belongs to is assigned or is linked to a user group. In other words if the document is assigned to a document group that is not yet linked to a user group then that document will be made public. Documents that are private to the manager users will not be private to web users if the document group is not assigned to a web user group and vice versa.

Manager access permissions

Here you can manage the user groups and document group, edit the user and select the groups (s)he should the document and select the groups it should belong to

User groups | Document groups | User/ Document

This is where we specify which user groups are given access to a document group, link a document group to a user group, select the group for a certain group, press 'Remove ->'. This will immediately remove the link.

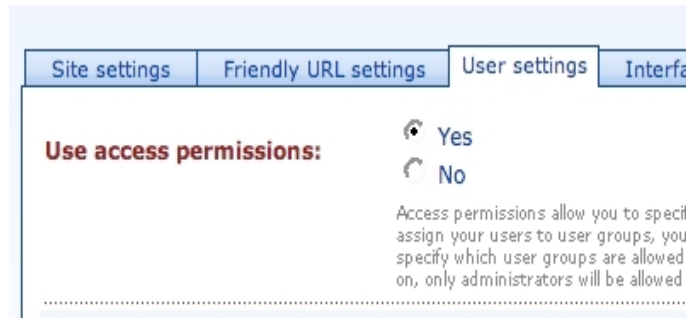
User group:	Document groups this user group has access to
Marketing	
Remove ->	Corporate
	Support <input type="button" value="Add"/>
Products	
Remove ->	Products
	Support <input type="button" value="Add"/>
Support	Support
Remove ->	Corporate
	Products <input type="button" value="Add"/>
Proofreader	
Remove ->	Corporate
Remove ->	Products
Remove ->	Support
	Support <input type="button" value="Add"/>

Now, as documents are created, they need to be assigned to the proper Document groups. As users are created, they are assigned to a certain Role, then to their proper User Groups. Only users belonging to user groups connected to a given document's document group can have access to that document. Even if a user has access to a given document, he can only do with it what his individual Role assignment allows.

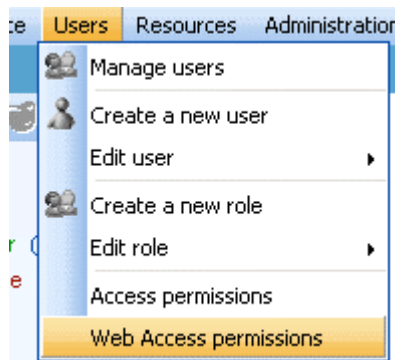
In this way, the Roles, User and Document Groups system allows a fine-grained control of individual document and manager user interaction.

14.2 Creating a Web User Group and Document Group

Make sure that "Use access permissions" is set to Yes in the User Settings tab of System Configuration.



1. From the "Users" menu select "Web Access Permissions"



Using top menu layout.

or



Using sidebar menu layout.

2. On "Web User groups" enter the name of the group then click the submit button:

Web User groups | Document groups | User/ Document

Here you can see which user groups have been set up. You can also members of the different groups. To add a new user to a group or to have been assigned the role with ID 1) always have access to all doc

Create a new user group

News Editors

The page will then refresh with the new user group listed below

Web User groups

News Editors

» **Users in group:** None.

3. To create a Document Group, click on the “Document groups” tab. Similar to the web group, you must enter the name of the document group then click the submit button.

Create a new document group

News Documents

The page will then refresh showing the new document group

Document groups

News Documents

» **Documents in group:** None.

4. Now that we have created a web user and document group we now need to link the two together. To do this, click on the “User/ Document group links” tab

Web User groups | Document groups | User/ Document group links

This is where we specify which user groups are given access (i.e. can edit or create children) f a user group, select the group from the dropdown, and click on 'Link'. To remove the link for a immediately remove the link.

Web User group:	
News Editors	
	No groups found.
	News Documents <input type="button" value="Add group"/>

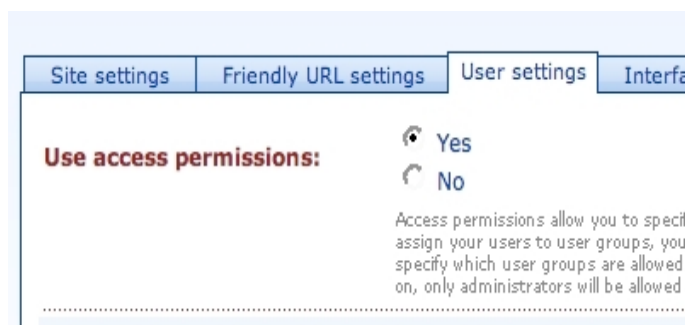
5. Click on the “Add Group” button to assign the “News Documents” group to the “News Editors” group:

Web User group:	
News Editors	
Remove ->	News Documents
	News Documents ▼ Add group

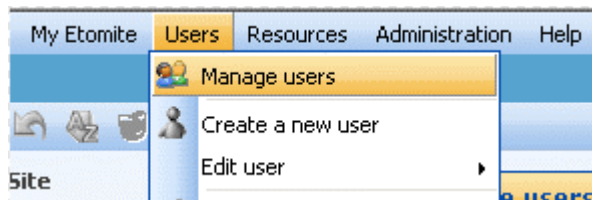
You can use the "Remove button" to later remove the group.

14.3 Creating a Web User Account

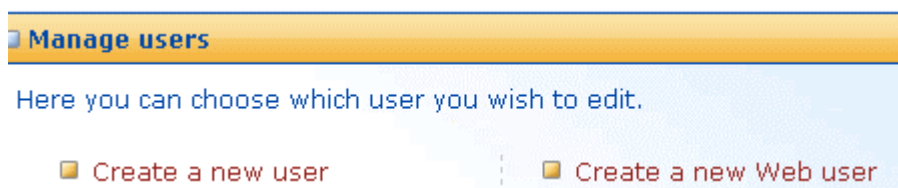
Make sure that "Use access permissions" is set to Yes in the User Settings tab of System Configuration.



1. From the manager select the "Manage Users" menu:



2. Next, Click the "Create new web user" menu option:



3. Fill out the necessary information in the fields provided.

Create/ edit web user

General **User settings**

Username:

Password:

How do you want to create this user's password? –

Let Etomite generate a password.

Let me specify the password:

The password you specify needs to be at least 6 characters long.

How do you want to create this user's password? –

Send the new password by e-mail.

Show the new password on screen.

Full name:

E-mail address:

You can also set a login home page for user by click on the “User Settings” tab and enter the ID in the field provide as shown below:

General **User settings**

Login Home Page

Enter the ID of the document you want to send user to after he/she has logged in. NOTE: make sure the ID you've

4. Next, Select the user group you want the user to have access to:

Web Access permissions

News Editors

5. Click the save button to save the user

Now that we’ve successfully created our web user account and have assigned the user to a document group, we can now secure documents by just assigning them a document group.

14.4 Setting up the login snippet

In order for the web users to be able to access your secure pages you must provide them with a login screen. To do this you can use the [[WebLogin]] Snippet. See the WebLogin snippet for more information.

Note: Pages with cache enabled will cache new menu items when a web user logs in. It's best to use not cache your restricted pages or use non-cacheable snippets ([! !]).

15 Taking Your Site Offline

There are times when you need to take your site offline temporarily. web2growCMS offers a flexible way to take the site offline and let users know what's going on.

Log in to the Manager as a user with Configuration management permissions. Go to Administration -> System settings. The offline configuration is in the first tab, Site Settings.

Site status: Online Offline
Select 'online' to publish your site, and 'offline' to show an unavailable message, and work on your site.

Site unavailable page:
Enter the ID of the document you enter belongs to an existing document.

Site unavailable message:
Message to show when the site is unavailable.

When you are logged in as a Manager user, you will continue to see the site as usual. This makes it easy to take your site offline for maintenance, and still be able to see and test your modifications before taking the site live. All other users will see your Site unavailable page, or the Site unavailable message.

If no document is assigned to use when offline, the Site unavailable message will be displayed.

16 Need more help?

web2growCMS is supported by web2grow.com. Please contact us at support@web2grow.com if you require assistance.

For our terms of support please visit web2grow.com.

Web2grow also offers comprehensive training programs in using web2growCMS. Please refer to web2grow.com for more information.

17 Updates record

17.1 Version 1.3

20 December 2006

Added ability to link directly to PDFs in the WYSIWYG editor.