



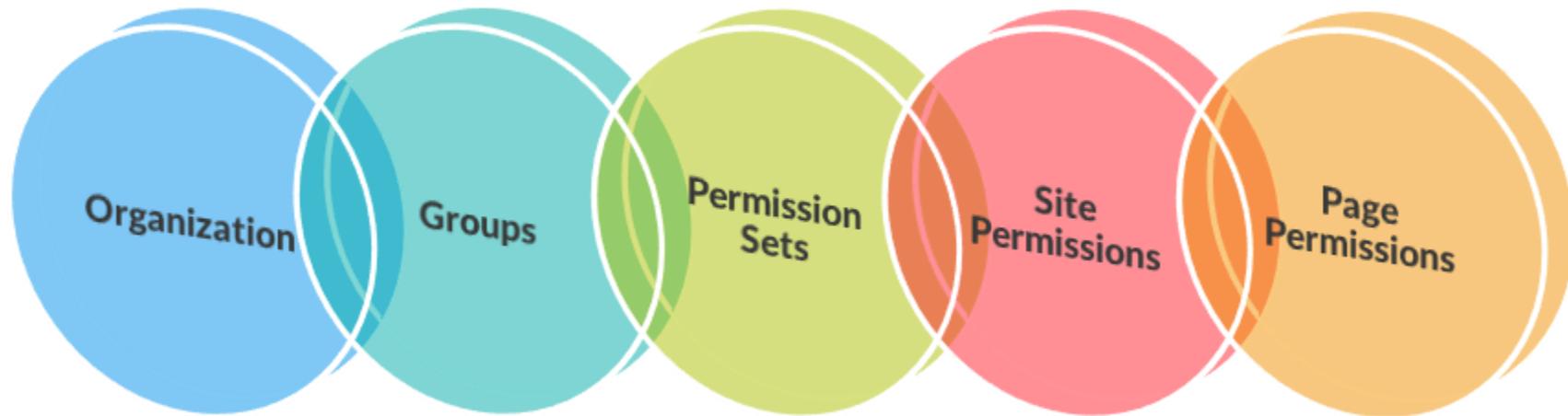
CivicEngage Evolve

**5 Steps to
Permissions**



5 Steps

To Permissions





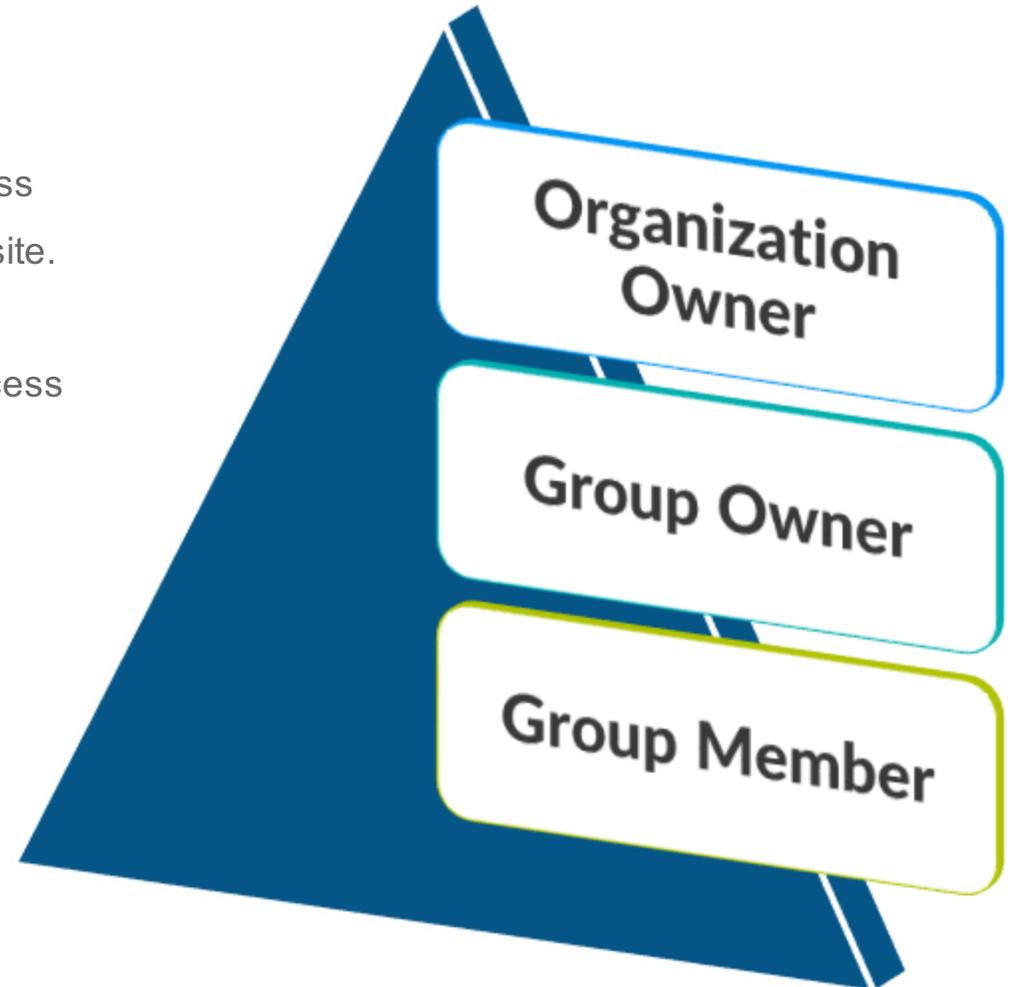
Step 1: Organizations Permissions

<https://organizations.civicplus.com/>

Permissions will start at the Organization and trickle down to the Headless Content Management System (HCMS) and Engage Evolve / Front-End site.

Reference the roles below to determine who may need Organization access and what the role entails.

- **Organization Owner** – The ability to manage all groups under an organization, modify user details, push out password reset email
- **Group Owner** – Can manage users in group(s) they are owners of
- **Group Member** – The ability to manage their own personal user account





Step 1: Organizations Permissions cont.

1. Organization Owner(s) created by CivicPlus.
2. Client works with CivicPlus Consultant to create Groups in Organizations that will push to the HCMS and Front End. A System Admin Group should be created for the customer front-end site administrators. Additional Groups are often created for each department, major division or service.
3. Users (staff content editors) are added to Groups as “Members” or “Owners.”

The screenshot shows the CivicPlus interface for the 'Emerald City' organization. The main heading is 'Groups'. A table lists several groups with their member counts and last modified dates. The table has columns for 'GROUP', 'MEMBERS', 'EXTERNALLY SYNCED', 'LAST MODIFIED', and 'ACTIONS'. The 'GROUP' column includes a dropdown menu set to 'Sort by Group'. The 'ACTIONS' column contains three vertical dots for each group.

GROUP	MEMBERS	EXTERNALLY SYNCED	LAST MODIFIED	ACTIONS
CivicPlus_Admins	85		3 years ago	⋮
CPNotify Admins	3		3 years ago	⋮
HCMS Admins	7		3 years ago	⋮
HCMS Author	7		3 years ago	⋮



Step 2: HCMS Groups

<https://content.civicplus.com/>

Groups entered in the Organization should now display in the Groups section of the HCMS. Each group from the Organization will default to a “Reader” role. Reference the roles below to determine which Organization Groups need access to the HCMS and modify accordingly.

- **Owner** – Full access & rights to the HCMS– has access to everything
- **Developer** – Full access to everything except for backups, clients, roles, languages & more section
- **Publisher** – Can only access Content and Assets section
- **Author** – Can only access Content and Assets section
- **Reader** – Viewing access only to Content and Assets





Step 2: HCMS Groups cont.

The screenshot displays the 'Groups' management interface. The left sidebar contains navigation options: Content Types, Content, Assets, Rules, and Settings. The main panel shows a list of groups with their respective roles. The interface includes a 'Refresh' button and a close button in the top right corner.

Group Name	Role
Administration	Publisher
CP-Training	Publisher
CivicPlus_Admins	Owner
Community Engagement	Publisher
Financial Services	Publisher
Human Resources	Publisher



Step 3: Permission Sets

HCMS Group permissions determine what permissions Groups have over the entire HCMS. Permission sets govern what rights (Organization) Groups have for each piece of content. Permission Sets are created in the HCMS. Reference the roles below to determine which Organization Groups need access to Permission Sets.

- **Owner, Developer, Publisher**– Full access to content and assets and can approve an author’s work
- **Author**– Can read, create, update and submit content and assets but will not be able to delete or publish items
- **Reader**– Viewing access only





Step 3: Permission Sets cont.

Created in the HCMS, Permission Sets most likely parallel Organization Groups however there can be differences. Permission Sets should be created to manage specific content. Each Permission Set needs to be opened and the Organization Groups set to the access role for that specific content. Work through each Permissions Set and assign Group roles.

The screenshot displays the HCMS interface with two main panels. The left panel is the 'Settings' sidebar, and the right panel is the 'Permissions - Administration' configuration page.

Permission Sets Panel: This panel lists various permission sets. Each entry includes a name, a 'System Use Only' checkbox, and 'Save', 'X', and delete icons.

Permission Set Name	System Use Only
Administration	<input type="checkbox"/>
Affordable Housing	<input type="checkbox"/>
Agendas and Minutes	<input type="checkbox"/>
CivicPlus_Admins	<input type="checkbox"/>
Community Engagement	<input type="checkbox"/>
Design Center	<input checked="" type="checkbox"/>
Financial Services	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>
Neighborhood Community Services	<input type="checkbox"/>
Parking	<input type="checkbox"/>

At the bottom of this panel, there is a 'Name' input field, an 'Add Permission Set' button, and a 'Cancel' button.

Permissions - Administration Panel: This panel shows a list of groups with their assigned roles. The 'Groups' section is expanded to show the following:

Group Name	Role
Administration	Publisher
CivicPlus_Admins	Owner
Community Engagement	Reader
CP-Training	Reader
Financial Services	Reader
Human Resources	Reader
Neighborhood & Community Services	Reader
Parking	Reader
Planning	Reader
Police	Reader
Public Works	Reader
Purchasing & Risk Mgmt.	Reader
System Admins	Owner



Step 4: Front- End Site Permissions

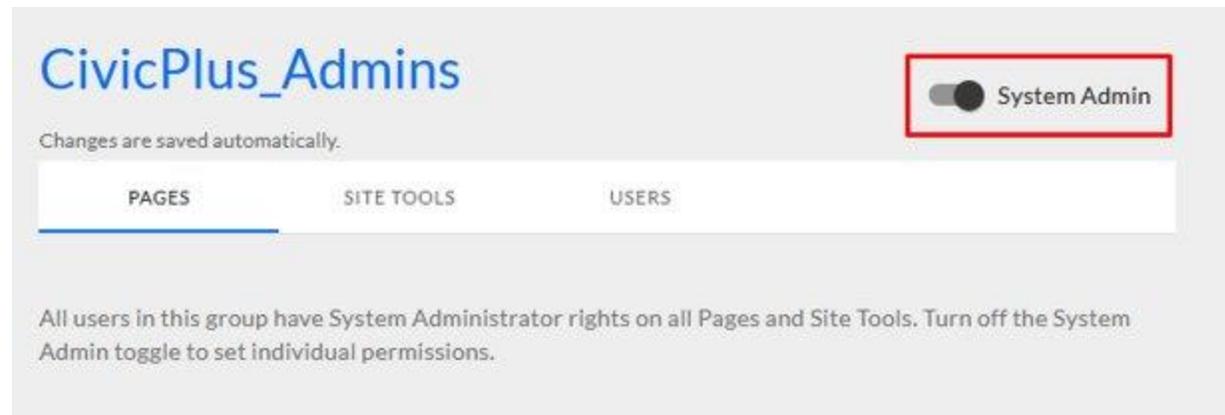
<https://st-name.civicplus.pro>

Organization Groups flow to the HCMS, and from the HCMS they trickle to the Engage Evolve/ Front-End site. The System Admin group created in Step 1 needs to have site permissions toggled on.

Systems Administrators manage the entire site, everything related to pages such as reorganizing pages, renaming pages, deleting page, modifying homepage banners and content and more.



GROUP	USERS	SYSTEM ADMIN	ACTIONS
CivicPlus_Admins	85	<input checked="" type="checkbox"/>	⋮
CP Notify Admins	3	<input type="checkbox"/>	⋮

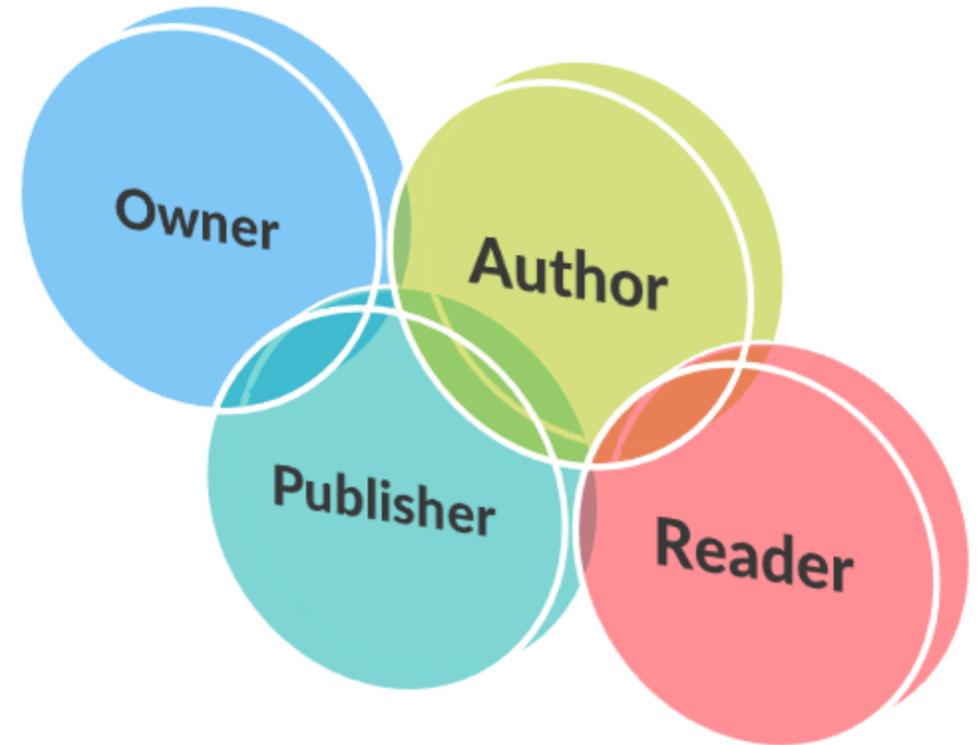




Step 5: Page Permissions

System Administrators need to set permissions for each page or group of pages on the site. If Page Permissions are not set System Administrators will be the only Group with access to edit pages. Reference the roles below to determine which level of access Organization Groups need to pages.

- **Owner**—All rights to pages
- **Publisher**—Create, edit & publish pages
- **Author**— Create, edit but cannot publish
- **Reader**— View only





Step 5: Page Permissions cont.

Page Permissions can be set from the Dashboard using the Site Permissions Module or on the Front-End using the Properties Tab on the Live Edit tool.

Financial Services

Changes are saved automatically.

System Admin

PAGES SITE TOOLS USERS

	R	A	P	O
All Pages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I Want To...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our Community	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CIVICENGAGE

CONTENT VERSIONS PROPERTIES LAYOUT

PROPERTIES PERMISSIONS

Require Sign In

This will require all users to sign in to view this page and all subpages. Users must be in a group with at least Reader permission to these pages in order to view them.

Page Permissions

SAVE AND PUSH DOWN

Reader Author Publisher Owner

R	A	P	O	Group Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Administration
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CivicPlus_Admin
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Community Engagement
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CP-Training
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Financial Services



Permissions Workflow

