


Setting up Members, Groups & Page 'security' cheat-sheet

A quick & dirty guide to setting up external users, known as Members in Umbraco, and Member Groups to 'secure' pages on the site:

Link: <http://www.gloucestershire.gov.uk/umbraco/#/member¹>

Left menu icon: 

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¹ If you don't have access to the link or can't see the icon contact digital@gloucestershire.gov.uk

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Members and Groups

It is important to stress that ‘security’ is a misnomer – all you can do is hide a page from users who are not logged in; therefore **all content on the web site and Staffnet is considered public and only UNCLASSIFIED material is allowed.**

Note: Media cannot be ‘secured’ on Umbraco yet; anyone with a link can see it unchallenged!

Groups

Since you will always add your Members to Groups, and Groups are used to ‘secure’ pages, you should set up Groups first.

It’s a simple process

1. Hit ⋮ on the “Member Groups” section of the tree
2. Enter the Group name (make it meaningful & logical – add a prefix like BSS_ if you need subgroups)
3. Hit **[Save]**

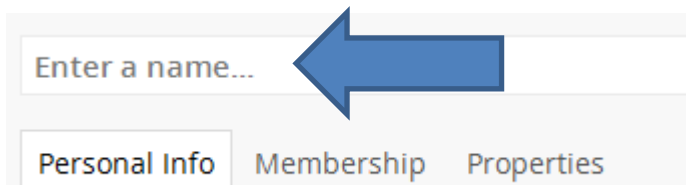
There is nothing else you can configure here

Members

Once you have all the groups you need create at least one Member per Group – a group with no Members is useless because no one can login to it.

The process is slightly more involved:

1. Hit ⋮ on the “Members” section of the tree
2. Choose “Website member”
3. Give the user a name



Enter a name...

Personal Info Membership Properties

4. “Personal Info” is optional
5. Membership is optional but you might want to use the “Comments” box to make some notes
6. Properties – set at least:
 - Login
 - Email
 - Choose group memberships from list
7. Hit **[Save]**

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You now have a basic user with no password. The best way to set a user password is to point your new user at <http://www.gloucestershire.gov.uk/please-log-in-to-see-this-page/> and get them to follow the [\(Remind me\)](#) link to set their own password.

'Securing' pages and sections

With Groups and Members set up you can 'secure' any page.

1. Find the page you need to secure
2. Right-click ... to open the page menu
3. Select "Public access"
4. Switch to "Role based protection" & hit [\[select \]](#)

Public access

Choose how to restrict access to this page

Single user protection
If you just want to setup simple protection using a single login and password

Role based protection
If you wish to control access to the page using role-based authentication, use Gloucsbraco's member groups.

[Cancel](#) [select](#)

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- From the left Groups list select the Group(s) your page will be visible to & hit [>>]

Role based protection

Pick the roles who have access to this page

Not a member of group(s)		Member of group(s)
<ul style="list-style-type: none">GSCBHH_testMusic testPageTestParking-ConsultationPTCSchN_AllSchoolsThinktravel test	<ul style="list-style-type: none">>><<	

- Choose the Login and Error pages (these should have been set up for each site – if not create them²)

Select the pages that contain login form and error messages

Login Page

Choose the page that contains the login form

+ Choose...

Error Page

Used when people are logged on, but do not have access

+ Choose...

Cancel

Update

- Hit [Update]
- The page and all children will only be visible to Members of the selected Groups and visitors will need a password to view

² See Appendix 1 Login & Error pages for details of how to set these up

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Appendix 1 Login & Error pages

Setting up a "Login" page for your new sub-site

1. From the site root create [...] a new page of "Login Page" type
2. Normal tabs operate as other pages
3. Switch to "Settings" to fully configure your login
 1. Select a "■ Registration page" – there will only be one of these for the system at content root
 2. Name it something like "Please login to continue"
 3. Configure the "Password Reset Token" email with
 - Sender (use donotreply@gloucestershire.gov.uk – if you use any other address test that you can receive a password reset email & it doesn't get spam blocked)
 - Subject
 - Message – which must include {resetLink}
 4. Set the "Expiration" period in hours
 5. Configure the "Password Reset Notification" email
 - Sender: donotreply@ unless you test
 - Subject
 - Message – a reassuring message to let them know the reset has been processed
4. **[Save and publish]**

Setting up an "Error" page

This is not a "404 not found" page

1. From the site root create [...] a new page of "Access Denied Page" type
2. Name it something like "You do not have permission to see this content"
3. You can leave the user here or use the page content to offer them a way out with a link to the "■ Registration page"
4. **[Save and publish]**