

Setting up Umbraco Users cheat-sheet

A quick & dirty guide to setting up users (writers/editors) on Umbraco:

- Create “User”
 - Gloucestershire County Council site
 - Special considerations for Staffnet
- Degrade permissions to “browse only”
- Reapply permissions where needed

Link: <http://www.gloucestershire.gov.uk/umbraco/#/users>¹

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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Create “User”

Gloucestershire County Council site

The quick version – 4 (ish) steps & no screen grabs

See **Special considerations for Staffnet** for the extra steps you need to perform for a Staffnet editor.

1. In “Users” on the tree create a user using their email address, make sure they are an “Editor”² and save
2. In “User permissions” on the tree
 - Select “Site” on the left
 - Select only “Browse” on the right and “Replace child node permissions” and save
This may take a while
3. Find the appropriate nodes and select the following permissions plus “Replace child node permissions”:
 - Audit Trail
 - Browse Node
 - Copy
 - Delete
 - Move
 - Create
 - Public access
 - Publish
 - Rollback
 - Send To Translation
 - Sort
 - Update
4. Save and send details to user – tell them to ask for a password reset to get going.

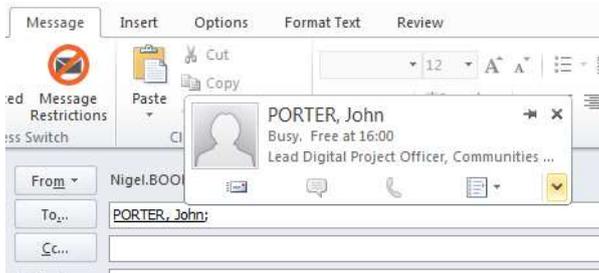
² Most “Users” on Umbraco should be “Editors”. If a particularly nervous or untrusted user needs to update pages, you can create a “Writer” profile which would give them only “Send to publish” permissions and require an Administrator or other Editor to complete publishing any pages for them after checking their work. See

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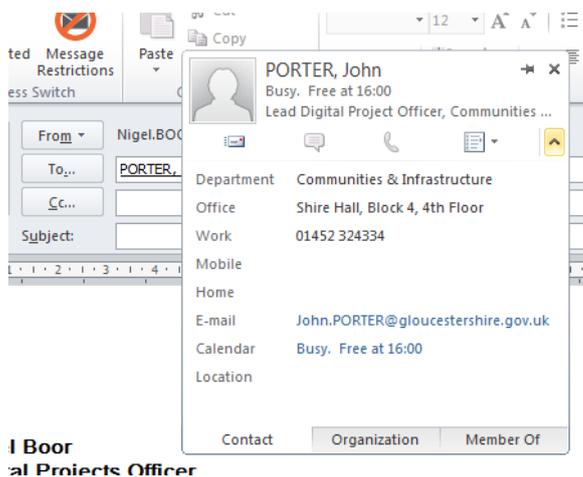
The long and detailed version with screen grabs

The easiest way to get the details you need to create a user is from the Outlook system:

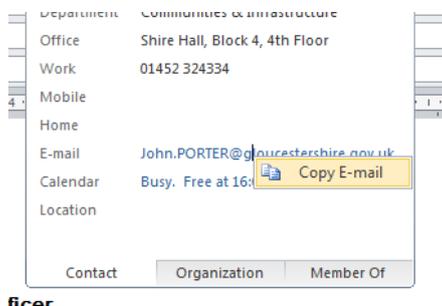
1. Create a new email "To:" the user you are creating
2. Hover over the name (you may need to do this twice if you get the black pop-ups).
3. This opens the user info pop-up



4. Expand it (with the [v] on the right)



5. Right-click & copy email (so you don't risk misspellings or typing errors)

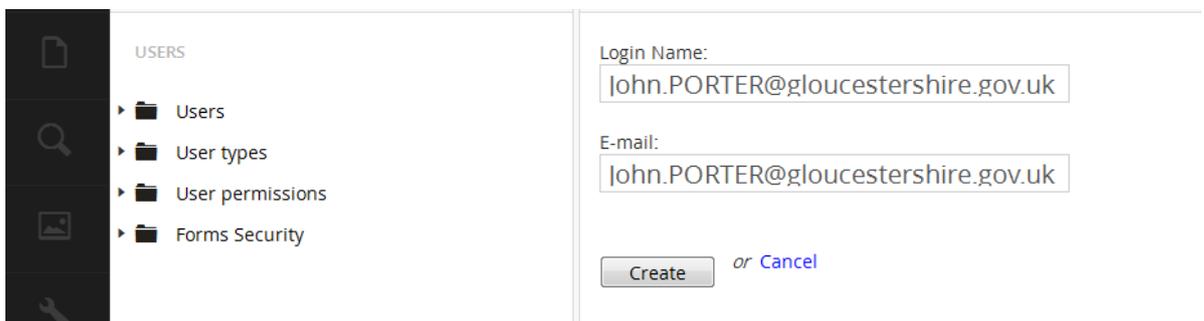


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6. Hit [...] next to "Users" on the tree and [+ Create] in the slide out menu to create a user

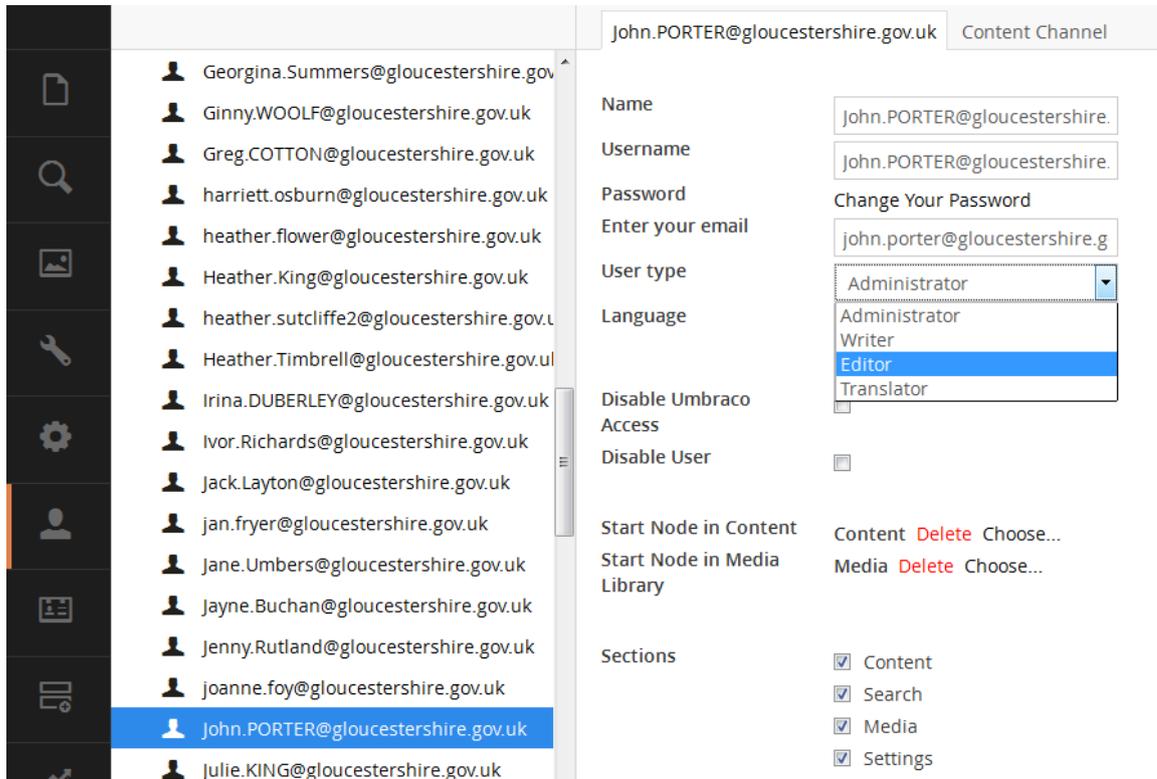


7. Paste the user's email into both fields then hit the { Create } button

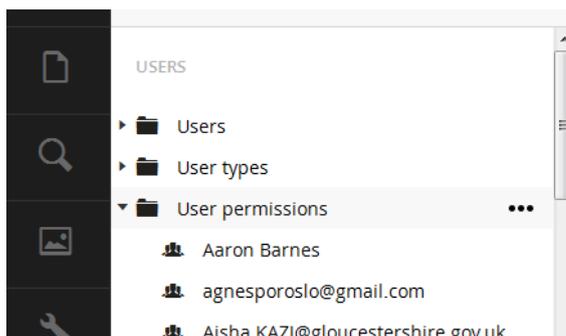


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8. Change the user type to “Editor” and tick the first three sections: Content, Search, Media³ (It’s important to give the search so they can use the search in the content tree.)



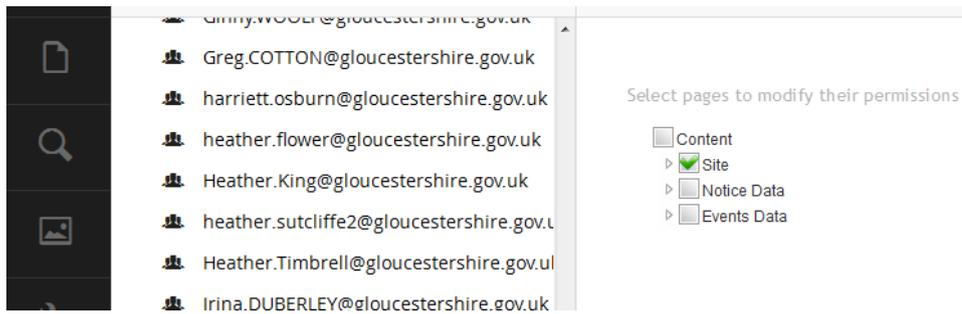
9. Ignore the start nodes – we are going to set permissions independently
10. **[Save]** the new user
11. Switch to “User permissions” in the tree and find your new user



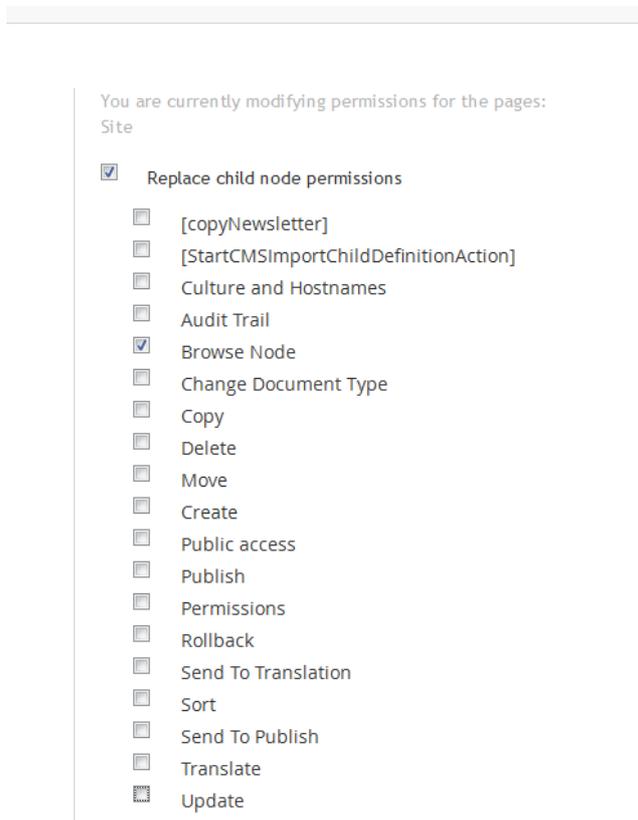
³ Comms authors and select sub-site authors may also be granted access to “SEO Checker” and other sections.

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12. Select “Site” in the pages to modify section



13. Leave only “Browse” selected, tick “replace child node permissions” and **[Save]** (this can take a while)



The user can now only browse the pages on the site.

14. Find and tick the nodes you want this user to be able to edit.

Be careful: it's easy to include & exclude things you didn't want to include or exclude.

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15. Tick the following permissions and “replace child node permissions”

- Audit Trail
- Browse Node
- Copy
- Delete
- Move
- Create
- Public access
- Publish
- Rollback
- Send To Translation
- Sort
- Update

16. **Save** the user

17. You now have a user with edit permissions where you want them and browser permissions elsewhere.

Instructions to the new user

The new user now needs to:

1. Open <http://www.gloucestershire.gov.uk/umbraco>
2. Use the “Forgotten password” link to ask for a reset instructions to be sent to the email you’ve just set up

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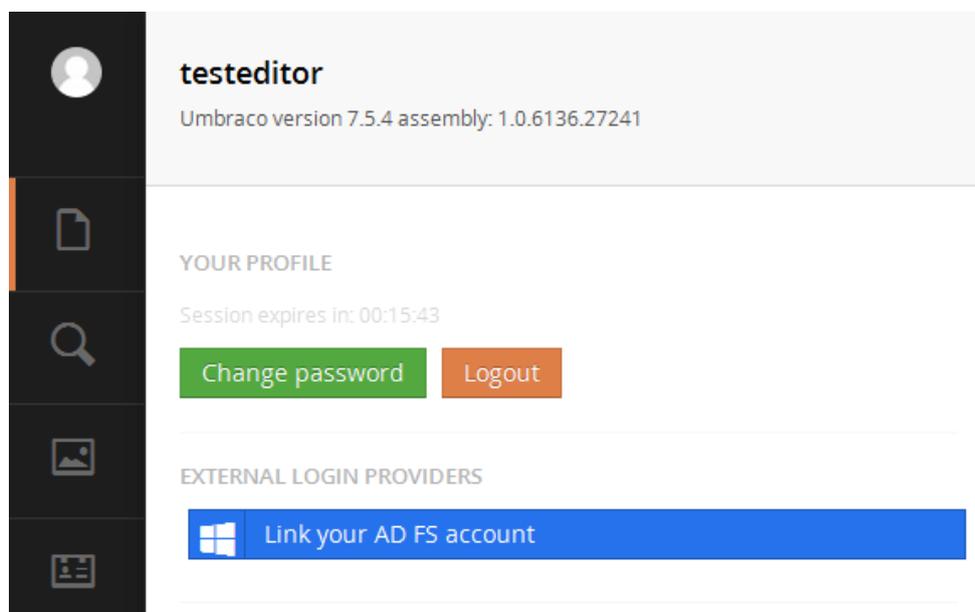
Special considerations for Staffnet

The set up procedure is the same on Staffnet except you need to perform one extra task:

- Once the user is set up, contact “ICT Service Desk” (email is simplest) and ask them to add the new user to the group: **grp_Intranet_BackOffice_Editor**

Instructions to the new Staffnet user

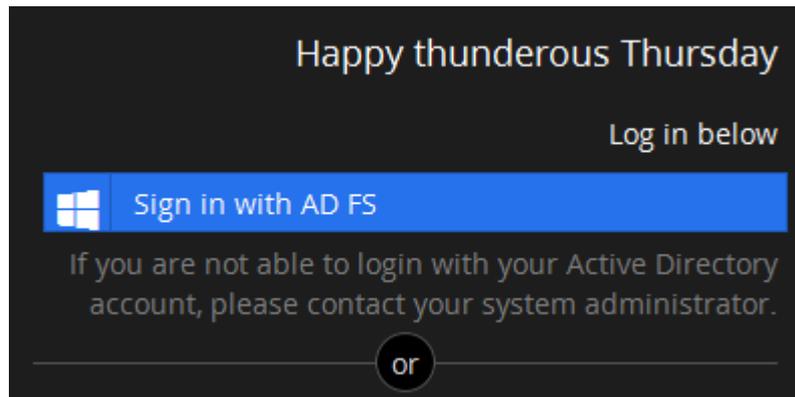
1. Open <http://staffnet.gloucestershire.gov.uk/umbraco>
2. Use the “Forgotten password” link to ask for a reset instructions to be sent to the email you’ve just set up (you can use this as a temporary login)
3. Once notified that you have been added to the editors group you can set up AD FS
 1. Log In with your temporary password
 2. Open your profile using the  at the top left of the editing screen
 3. In the menu panel click “Link your AD FS account”



(If you receive any error messages contact the Digital Team)

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4. You can now log out and back in using the “Sign in with AD FS” button



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Appendix: Special cases – “Send to publish” permissions

Simple “Writer”

If you ever need to set up a restricted profile where the User is not trusted (by their manager or the Digital Team) to publish immediately to the web, it is possible to set them up as a “Writer”. Writers have much more limited permissions:

- Browse Node
- Create
- Send to publish
- Update

Normally you would set them up with a “Start Node in Content” which allows them to edit only within their area. You can use the same techniques outlined in the ‘Create “User”’ section above to create a user with broader browse permissions (allowing them to link widely to other pages in the site) but be careful to only grant the four permissions listed above.

Hybrid “User” – more than a “Writer” but limited Publish permissions

Umbraco allows extensive flexibility to create a user with permissions beyond the default four “Writer” permissions while still restricting their ability to publish immediately to the web: simply switch the “Publish” permission off and replace it with “Send to publish”.

Notification for pages “sent to publish”

Note: If you set up a Writer or Hybrid with only “Send to publish” permissions **you must set up notifications** on the pages they have been allowed to edit so you know when they have submitted an update.

The sensible approach for all Administrators is to set up notifications for the whole site for a minimum of “Send to publish”. The procedure is the same for managers who want to be notified of “Send to publish” activity by their team which they can review and publish.

Note: These notifications must be set up in Umbraco by the User requesting notification. They cannot be set up on their behalf.

For the entire site:

1. Right click the [...] on “Site”
2. In the menu panel select “Notifications” 
3. Select at least “Send to publish”⁴

For other areas, find the node on the tree and use the [...] to set up notifications there.

⁴ Administrators may also wish to select other notifications such as “Create”, “Delete” or “Move”