



# EngageOne™ Designer

## User Administration Roles, Groups & Privileges

Version 1.1

Technical Note Series

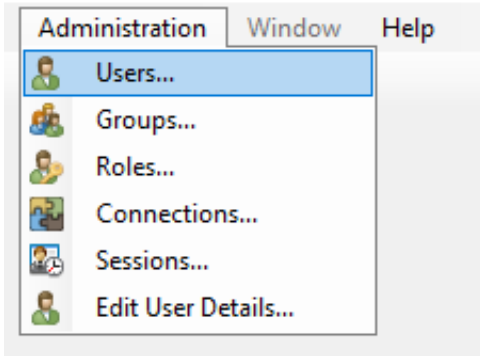


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# Introduction

EngageOne™ Designer contains powerful user management to enable the definition of user roles and privileges to different components of the Designer repository.



There are two methods of managing users within Designer:

- The default inbuilt Designer's user management system
- SSO via Active Directory to manage the Users and user Groups to be assigned to Designer Roles

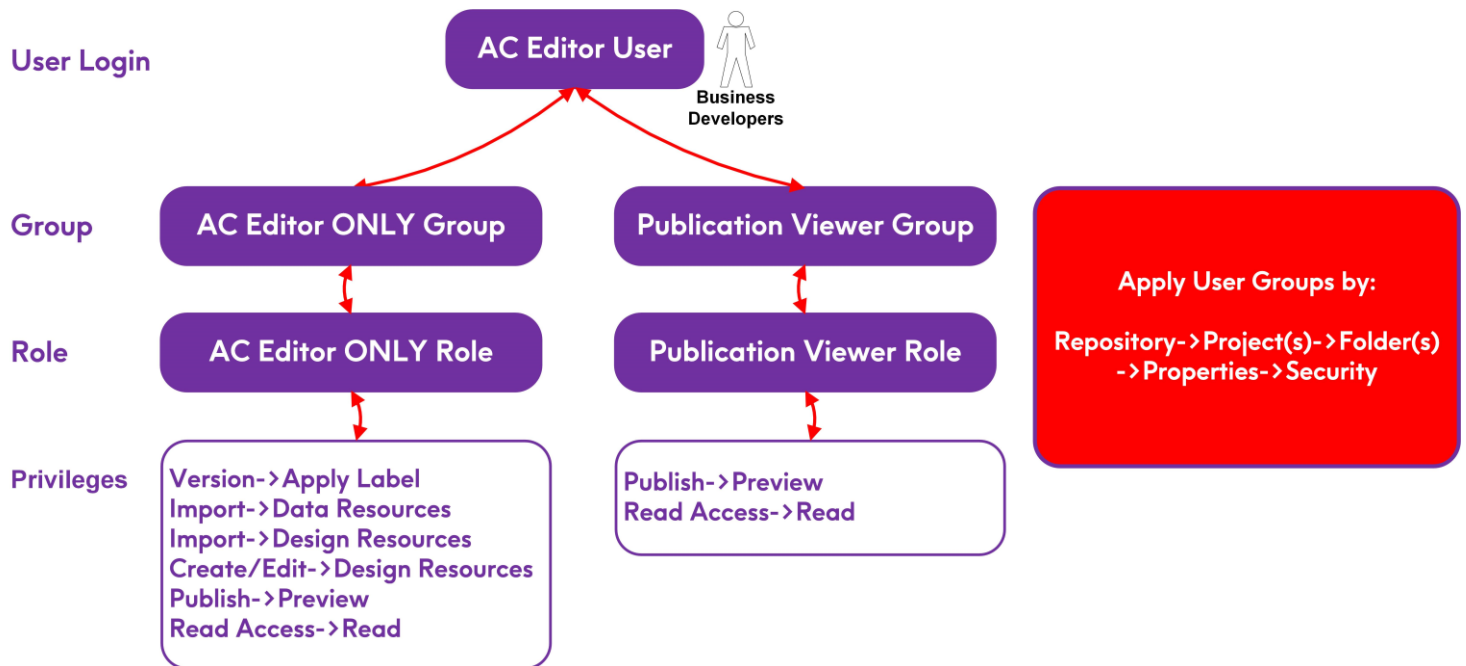
By configuring multiple roles within the system, this enables users for instance to be assigned Read/Write privileges only to certain folders/projects within the repository, such as Active Content objects.

This means that users can be granted Read Only privileges to more critical folders where the Publications are held and therefore protect the core system objects from less experienced or trusted users from having edit/save/delete privilege.

The outcome is that a hierarchy of users can be established depending upon their responsibilities using Designer, to grant edit/save privilege only to the components or sections where necessary, e.g. an Active Content only editor role.

# Designer User Role/Group/ hierarchy

The following diagram illustrates the hierarchy of user Groups & Roles to be able to configure a user to have Read/Write privileges for Active Content objects only and Read/Only privileges for Publications and other components.



The following sections step through the pieces to setup, such as AC ONLY editor user in Designer.

# Configuring Roles and Groups

## Create an Active Content Only Editor user

1. Login as an 'admin' user to have privileges to access User Administration.
2. Add a new user with suitable username to identify as 'Active Content Editor ONLY', with the login user name of 'aceditor'.

The screenshot displays the 'Users' management window in EngageOne Designer. The window has a title bar with a user icon and the text 'Users x'. Below the title bar is a 'Users' section with a table listing existing users. The table has columns for 'Full name', 'User name', and 'Status'. Two users are listed: 'AC Editor ONLY' with user name 'aceditor' and 'Administrator' with user name 'admin' and status 'Logged On'. To the right of the table are 'Add' and 'Remove' buttons. Below the table is a 'User Information' section with tabs for 'Details', 'Groups', and 'Roles'. The 'Details' tab is selected, showing fields for 'Full name', 'User name', and 'New Password'. A 'Save details' button is at the bottom right. An 'Add New User' dialog box is open in the center, with fields for 'Full name', 'User name', and 'Password', and 'OK', 'Cancel', and 'Help' buttons.

Full name	User name	Status
AC Editor ONLY	aceditor	
Administrator	admin	Logged On

**Add New User**

Full name:

User name:

Password:

OK Cancel Help

**User Information**

Details Groups Roles

Full name:

User name:

New Password:

Save details







## Create two roles

The two user roles should be created, which in turn will ultimately both be assigned to the same user:

1. Active Content Editor ONLY
2. Active Content Editor Publication Viewer ONLY

Roles x

Roles

Role name	Description
 ActiveContentEditor	Active Content Editor ONLY
 ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
 Author	Author
 PowerUser	Power User
 ProjectAdmin	Project Administrator
 SystemAdmin	System Administrator

Add

Remove

Role Information

Details

Groups and Users

Privileges

Name:







ActiveContentEditor

Description:

Active Content Editor ONLY

Save details

Roles

Role name	Description
 ActiveContentEditor	Active Content Editor ONLY
 ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
 Author	Author
 PowerUser	Power User
 ProjectAdmin	Project Administrator
 SystemAdmin	System Administrator

Role Information

Details

Groups and Users

Privileges

Name:

ActiveContentEditorPUBViewer

Description:

Active Content Editor Publication READ ONLY

# Assign Role privileges

Privileges are the specific privileges that are assigned to a specific User Role. They are assigned in combinations according to the overall functions that the Role requires when using Designer.

Designer does not have Privileges such as ‘Active Content Editor Only’ or ‘Publication Viewer Only’; they are configured by enabling/disabling multiple privileges in combination to create the overall Role required.

Privileges are assigned to the two Roles already created above as follows:

- 1. Active Content Editor ONLY
- 2. Active Content Editor Publication Viewer ONLY

Roles

Role name	Description
ActiveContentEditor	Active Content Editor ONLY
ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
Author	Author

Role Information

DetailsGroups and UsersPrivileges

Privileges

Privileges	Description
<input checked="" type="checkbox"/> Apply label	Apply user defined version label
<input type="checkbox"/> Branch items	Branch project or item
<input type="checkbox"/> Delete label	Delete version labels
<input type="checkbox"/> Merge items	Merge project or item
<input type="checkbox"/> Project management	Create, edit and delete Projects
Import	
<input checked="" type="checkbox"/> Data resources	Import sample data, legacy data format
<input checked="" type="checkbox"/> Design resources	Import images, overlays, external documents
<input type="checkbox"/> Global resources	Import message environment, fonts, code page
<input type="checkbox"/> Snapshot	Import snapshots
Export	
<input type="checkbox"/> Code page	Export code page
<input type="checkbox"/> Design resources	Export images, overlays, external documents
<input type="checkbox"/> Sample data	Export sample data
<input type="checkbox"/> Snapshot	Export snapshot
Create and edit	
<input type="checkbox"/> Data resources	Create and edit data format, interactive data, data dictionary, data ma...
<input checked="" type="checkbox"/> Design resources	Create and edit publication, document, Active Content, key maps, im...
<input type="checkbox"/> Environment resour...	Create and edit production job, output device, host, resource maps
<input type="checkbox"/> Folders	Create and edit folders
<input type="checkbox"/> Global resources	Create and edit locales, set as default locale, edit message environm...
Delete	
<input type="checkbox"/> Data resources	Delete data format, interactive data, data dictionary, data map, sampl...
<input type="checkbox"/> Design resources	Delete publication, document, Active Content, key maps, images, ov...
<input type="checkbox"/> Environment resour...	Delete production job, output device, host, resource maps
<input type="checkbox"/> Folders	Delete folders
<input type="checkbox"/> Global resources	Delete code pages, locales, message environment
Publish	
<input checked="" type="checkbox"/> Preview	Use preview, preview for EngageOne or advanced preview
<input type="checkbox"/> Publish	Use publish, publish by label or publish for EngageOne
<input type="checkbox"/> Publish resources	Use publish all EngageOne resources
Read access	
<input checked="" type="checkbox"/> Read	Read

Roles

Role name	Description
ActiveContentEditor	Active Content Editor ONLY
ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
Author	Author

Role Information

DetailsGroups and UsersPrivileges

Privileges





Privileges	Description
<input type="checkbox"/> Global resources	Create and edit locales, set as default locale, edit message environm...
Delete	
<input type="checkbox"/> Data resources	Delete data format, interactive data, data dictionary, data map, sampl...
<input type="checkbox"/> Design resources	Delete publication, document, Active Content, key maps, images, ov...
<input type="checkbox"/> Environment resour...	Delete production job, output device, host, resource maps
<input type="checkbox"/> Folders	Delete folders
<input type="checkbox"/> Global resources	Delete code pages, locales, message environment
Publish	
<input checked="" type="checkbox"/> Preview	Use preview, preview for EngageOne or advanced preview
<input type="checkbox"/> Publish	Use publish, publish by label or publish for EngageOne
<input type="checkbox"/> Publish resources	Use publish all EngageOne resources
Read access	
<input checked="" type="checkbox"/> Read	Read

## Create two Groups

The two Groups are created and the required Roles are assigned to each Group:







1. Active Content Editor ONLY (AC Editors)
2. Active Content Editor Publication Viewer ONLY

Groups

Group name	Description
 AC Editors	AC Editors ONLY
 ActiveContentEditorPUBViewer	ActiveContentEditorPUBViewer
 Administrators	Administrators
 Everyone	Everyone on the system

Group Information

DetailsUsersRoles

Role name	Description
<input type="checkbox"/>  ActiveContentEditor	Active Content Editor ONLY
<input checked="" type="checkbox"/>  ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
<input type="checkbox"/>  Author	Author
<input type="checkbox"/>  PowerUser	Power User
<input type="checkbox"/>  ProjectAdmin	Project Administrator
<input type="checkbox"/>  SystemAdmin	System Administrator

Groups

Group name	Description
 AC Editors	AC Editors ONLY
 ActiveContentEditorPUBViewer	ActiveContentEditorPUBViewer
 Administrators	Administrators
 Everyone	Everyone on the system

Group Information

DetailsUsersRoles

Role name	Description
<input checked="" type="checkbox"/>  ActiveContentEditor	Active Content Editor ONLY
<input type="checkbox"/>  ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
<input type="checkbox"/>  Author	Author
<input type="checkbox"/>  PowerUser	Power User
<input type="checkbox"/>  ProjectAdmin	Project Administrator
<input type="checkbox"/>  SystemAdmin	System Administrator



## Assign User & Group to Roles

The User and the Groups are then assigned to the two Roles as follows:

### Roles

Role name	Description
ActiveContentEditor	Active Content Editor ONLY
ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
Author	Author

### Role Information

Details Groups and Users Privileges

Name	Type
AC Editor ONLY	User
ActiveContentEditorPUBViewer	Group

< Add  
Remove >

Name	Type
AC Editors	Group
Administrators	Group
Everyone	Group

Roles x Groups

### Roles

Role name	Description
ActiveContentEditor	Active Content Editor ONLY
ActiveContentEditorPUBViewer	Active Content Editor Publication READ ONLY
Author	Author

### Role Information

Details Groups and Users Privileges

Name	Type
AC Editor ONLY	User
AC Editors	Group

< Add  
Remove >

Name	Type
ActiveContentEditorPUBViewer	Group
Administrators	Group
Everyone	Group

# Add access security to project folders

The default Designer ‘admin’ user is assigned to every project folder in the repository.

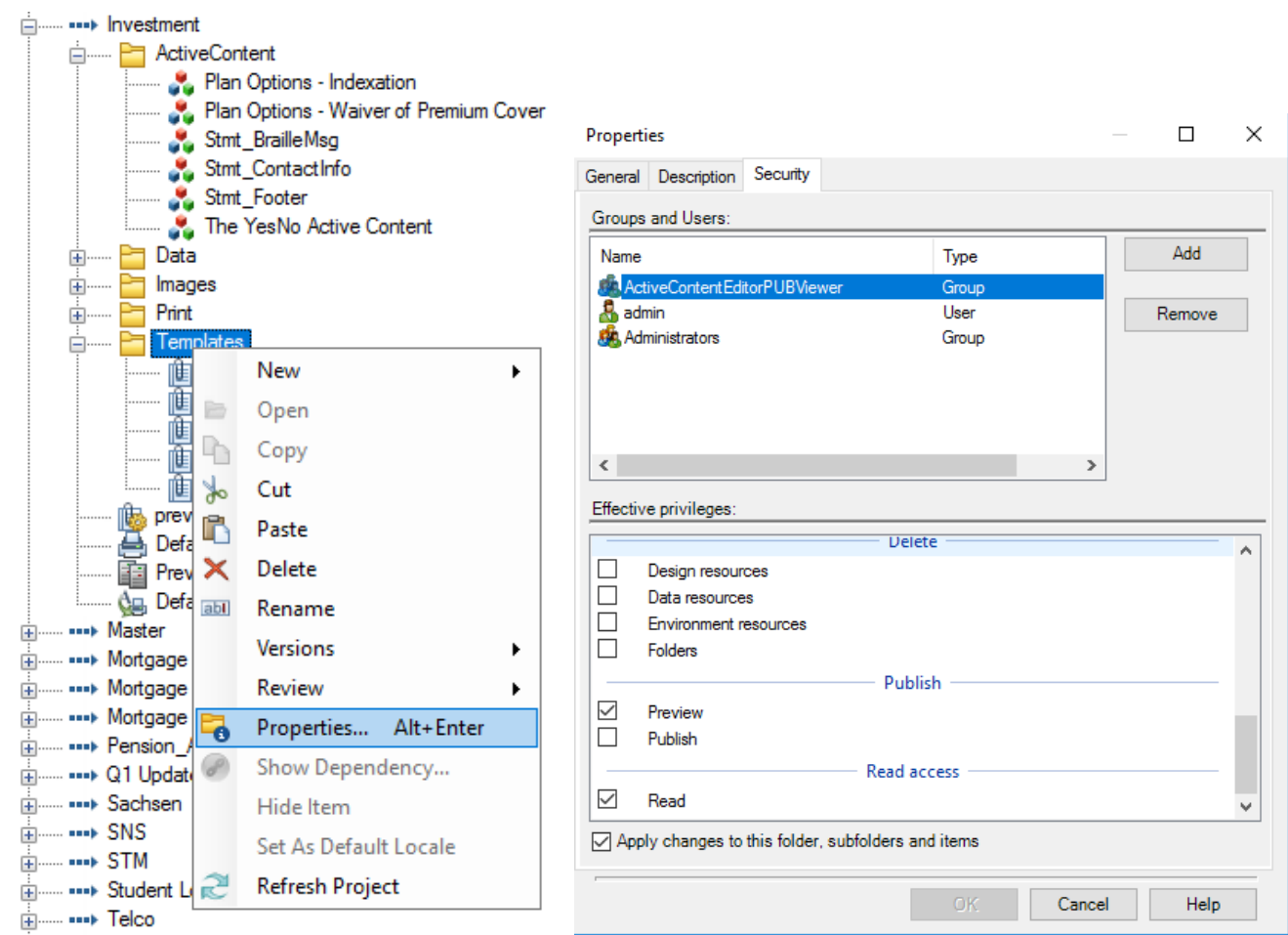
The User Groups created above are then assigned at the folder level within project(s) where their User privileges should apply. Typically, it is expected that a project folder hierarchy will included separate folders for Active Content objects, with other components such as Publications and Data configurations in other folders.

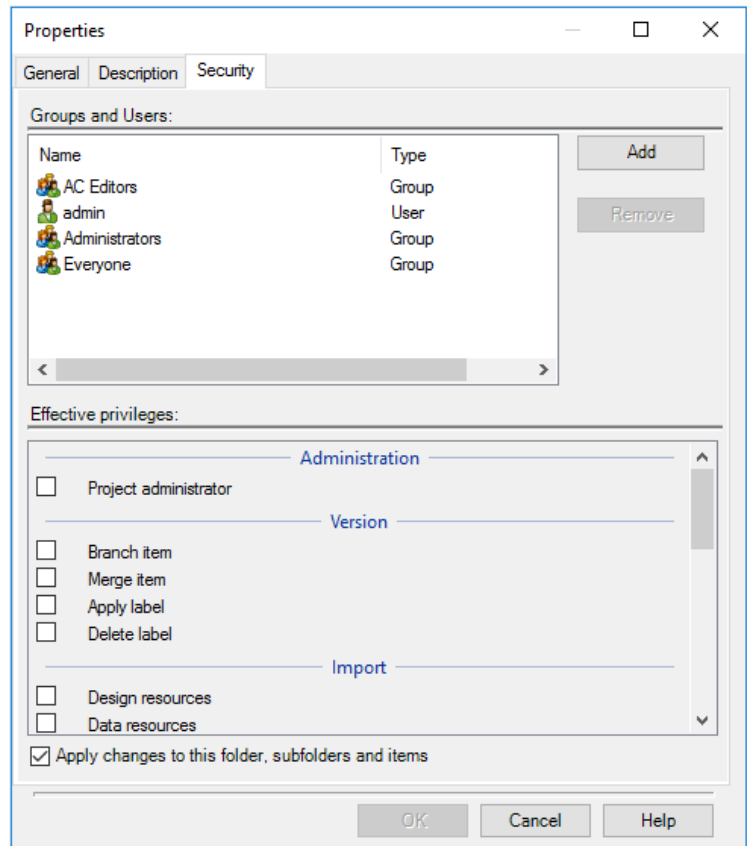
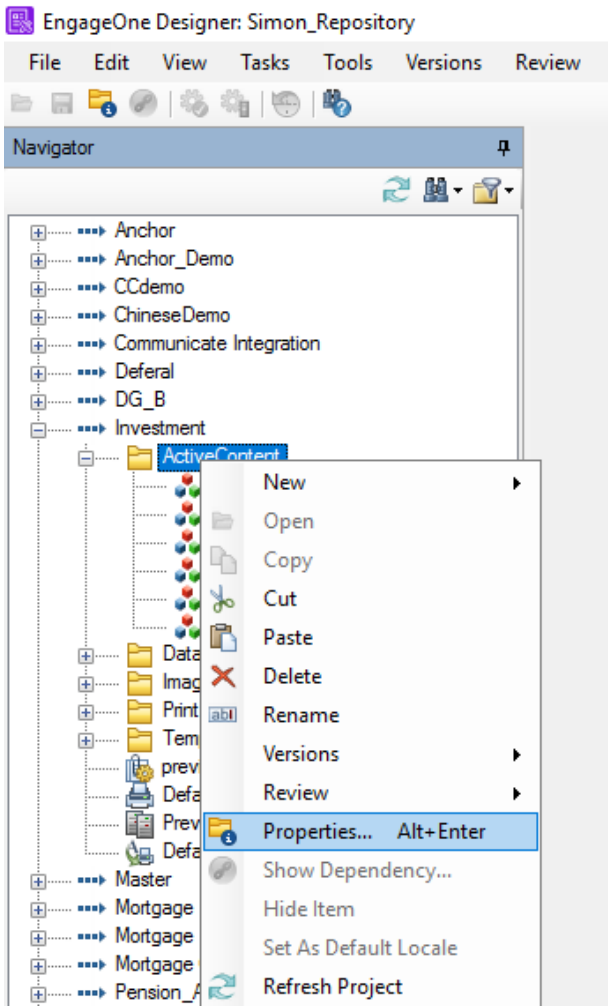
This allows the two User Groups that have been created to be specifically assigned to the required folders:

- 1. **Active Content** folder → Active Content Editor ONLY (‘AC Editors’) user Group
- 2. **Templates** folder → Active Content Publication Viewers ONLY user Group

Note:

- All objects in the folder assume the same security privileges.
- The ‘Administrators’ Group is already assigned to each folder by default, so the ‘admin’ user retains global access to all projects and all folders.
- User Groups (privileges) must be assigned to each project within each repository, if multiple repositories are available.



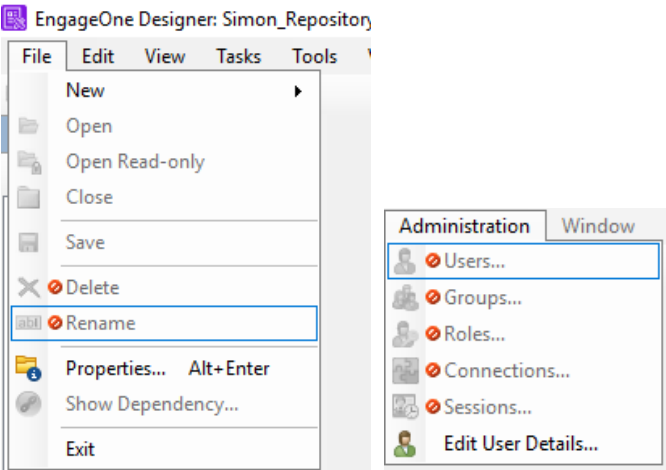


If required, the privileges can be further modified by enabling/disabling them in the 'Effective Privileges' section of the properties dialog box.. However, this should not be required if the Roles are correctly configured via the 'User Administration' menu options.

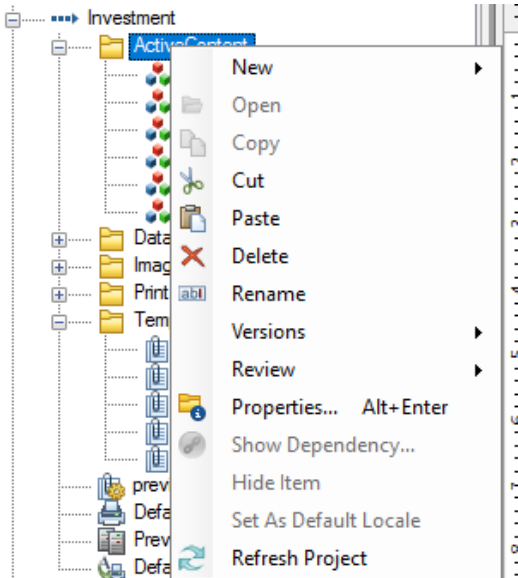
# Designer user privileges in action

The Active Content Editor ONLY user and its associated Roles and assigned Groups, are then visible as follows when using Designer with the ‘aceditor’ user vs the ‘admin’ user:

The ‘aceditor user is not able to make any changes to User Administration:



The ‘aceditor’ user has full access privileges to the Active Content folder objects:



The screenshot shows the SAP Project Explorer with a tree structure. The 'Investment' folder is selected, and a context menu is open over it. The menu options are:

- New
- Open
- Copy
- Cut
- Paste
- Delete
- Rename
- Versions
- Review
- Properties... Alt+Enter
- Show Dependency...
- Hide Item
- Set As Default Locale
- Refresh Project

Navigator

- Anchor
- Anchor\_Demo
- CCdemo
- ChineseDemo
- Communicate Integration
- Deferal
- DG\_B
- Investment
  - ActiveContent
    - Plan Options - Indexation
    - Plan Options - Waiver of Premium Co
    - Stmnt\_BrailleMsg
    - Stmnt\_ContactInfo
    - Stmnt\_Footer
    - The YesNo Active Content
  - Data
  - Images
  - Print
  - Templates
    - InvestStmnt
    - SendCopyEmailCommunicate
    - SendCopyEmail
    - SendCopyLetterNew
    - TheRandomiser

InvestStmnt [Read-only] x

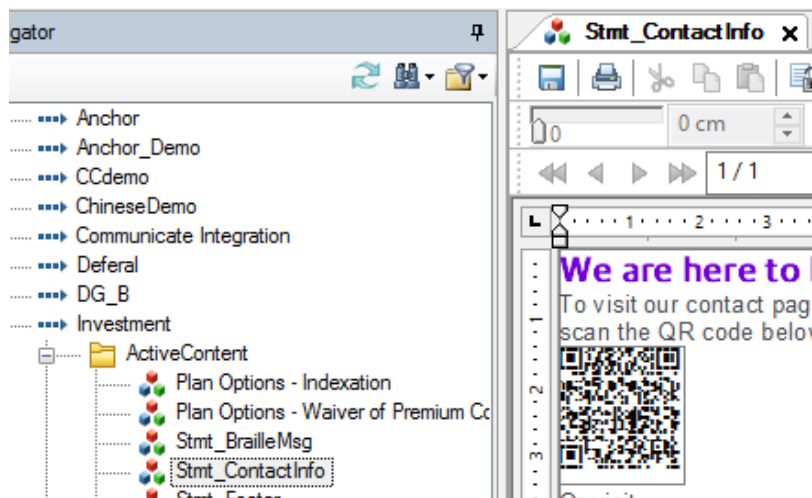
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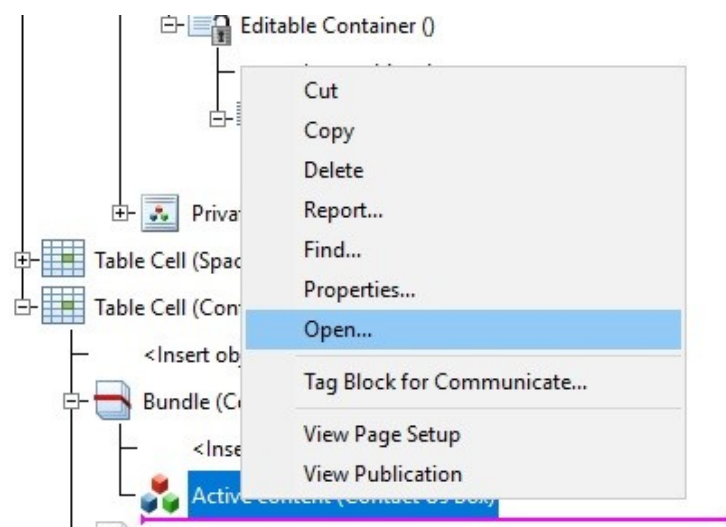
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This privilege is also granted when 'Opening' an Active Content object from within a Read Only Publication as the AC object is held and edited from the AC folder where the AC Editor Group privilege has been assigned.



# Designer Single Sign-on (SSO)

Designer can be configured to use Active Directory to enable SSO for Designer users. The added Designer User Group(s) must match the Active Directory Group name.

Refer to the 'Designer Single Sign on (SSO)' PDF guide distributed with the Designer software for more details about configuring SSO.

<https://support.precisely.com/products/engageone-designer/>



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