DIGIMAKER 6.0

Digimaker 6.0
How to guides

1.1 How to Add a New Organisation

The concept of 'Companies' is used within the system as a way of organising users in a logical hierarchical structure. Branch Companies, Departments, and Employees (Users) sit below Companies in this hierarchy. A company could be your own organisation, a partner's company, clients or other 'top-level' user organisational structures.

Note! You cannot add,
A branch company without first established a company.
A department without having established a company or branch company.
An employee without having established a department.

To add a new organisation,

Step 1: Select the **Main Menu Settings tab**, then in **Workspace** click on **New organization** or in the **Settings submenu** under **Content**, position the mouse over the **Users and Target Groups** menu item. From the pop-up menu, choose **Add template**.

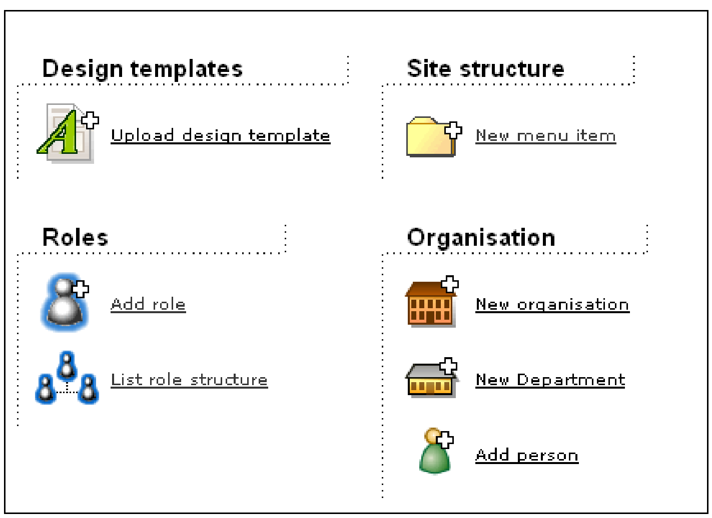


Figure 1: New Organisation Shortcut

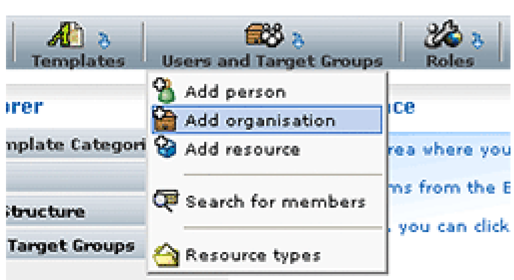


Figure 1: Add Organisation

Clicking the icon next to the **Users and Target Groups** element in **Settings** or **Content Explorer** displays a pop-up menu. Choose **Add organization**.

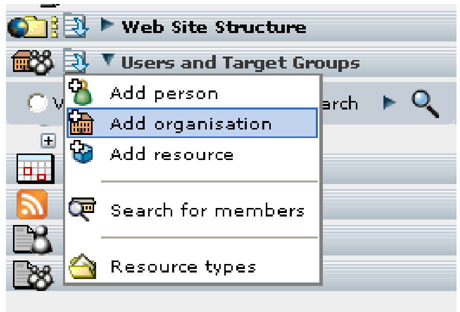


Figure 2: Add Organisation

In **Users and Target Groups** element, locate the item that you want to add a new organisation in, then select Add organisation from the pop-up menu.

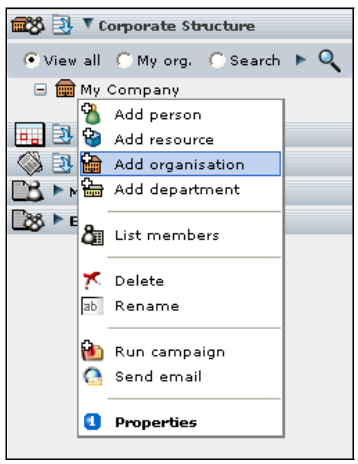


Figure 3: Add Organisation

Step 2: You now define the properties of the new company.

Note! Only the fields marked with a red star are compulsory.

General Tab

Figure 4: Add Organization unit

Information Section

- **Name** is the name of the company.
- **Type** allows you to choose between a Company and a Department.
- **Parent** allows you to select the placement of your organisation.
- **Org number** allows you to enter your organisation number.
- **Profile Image** allows you to associate a logo with the company record.
- **Working hours** allows you to enter the organisations opening hours.

Online Contact Details

- **E–mail 1** is the primary e-mail address.
- **E–mail 2** is the secondary e-mail address.
- **PERSON DETAILS** allows you to enter telephone numbers where:
  - **Telephone 1 i**s the primary telephone number.
  - **Telephone 2** is the secondary phone number.
- **Fax** allows you to enter the company Fax number.
- **ADRESSES** allows you to enter the organisations address details.

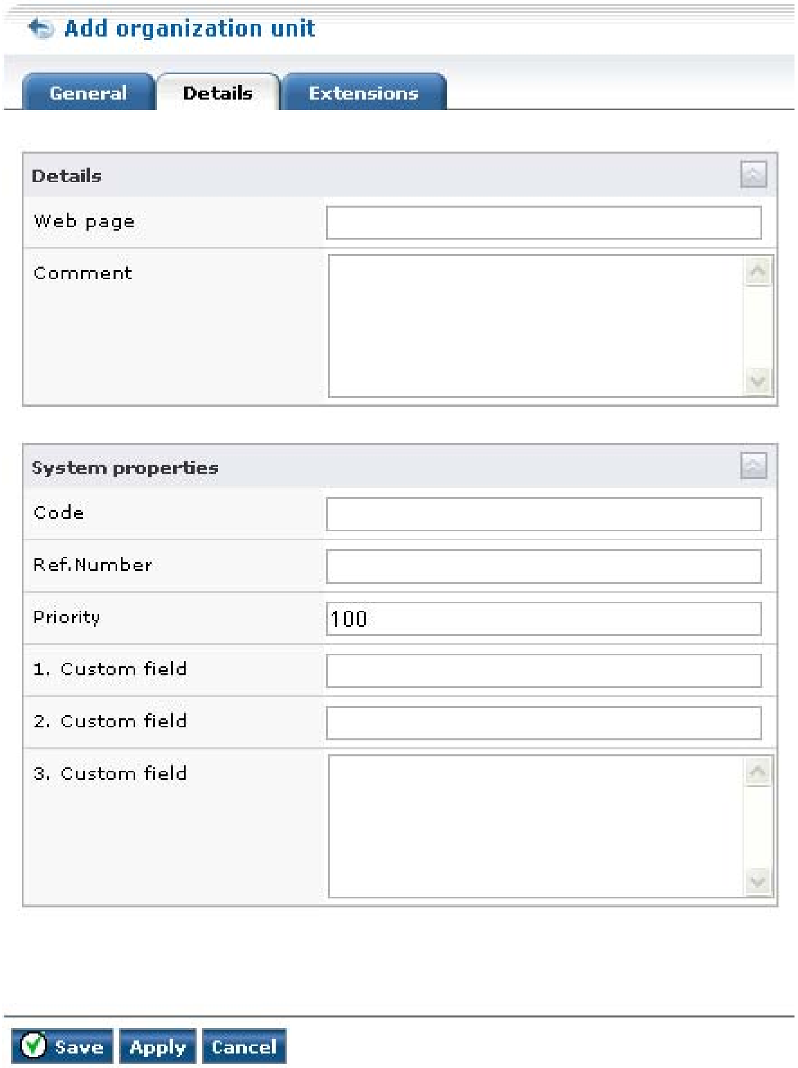


Figure 5: Add Organisation Unit

Details Tab

- **Web page** allows you to enter the URL (internet address) of the company's web page.
- **Comment** allows you to add additional comments regarding the organisation.
- **Code** is an internal company code.
- **Ref. Number** allows you to enter a reference number.
  Example: client number, customer account number etc.
- **Priority** allows you to control a company's placement in the list of companies.
- **Custom fields** allow you to add extra information of your choice.

Step 2: Select Save when you have completed the registration of the new organisation.

Note! You need to update the Content Explorer by clicking on button at the top-right corner of the Content Explorer.

1.2 How to Add a Department

To add a department,

Step 1: Select the main menu Content tab and choose New department from the list of shortcuts displayed in Workspace or select the **Main Menu Settings** tab, then In Workspace click on New department from the shortcuts.

Figure 6: Content workspace

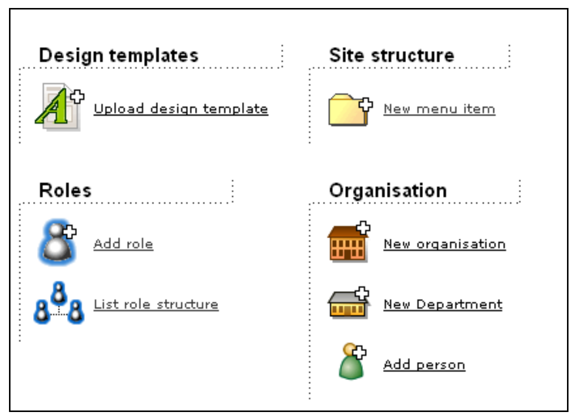


Figure 7: Settings Workspace

Go to **Content Explorer** and In **Users and Target Groups** element locate the menu item that you want to add a new organisation in, then select **Add organisation** from the pop-up menu.

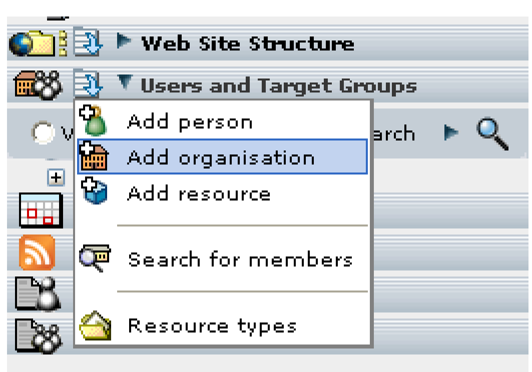


Figure 8: Users and Target Groups

Step 2: Define the properties and details of the sub company in the same way you would for a 'top-level' company.

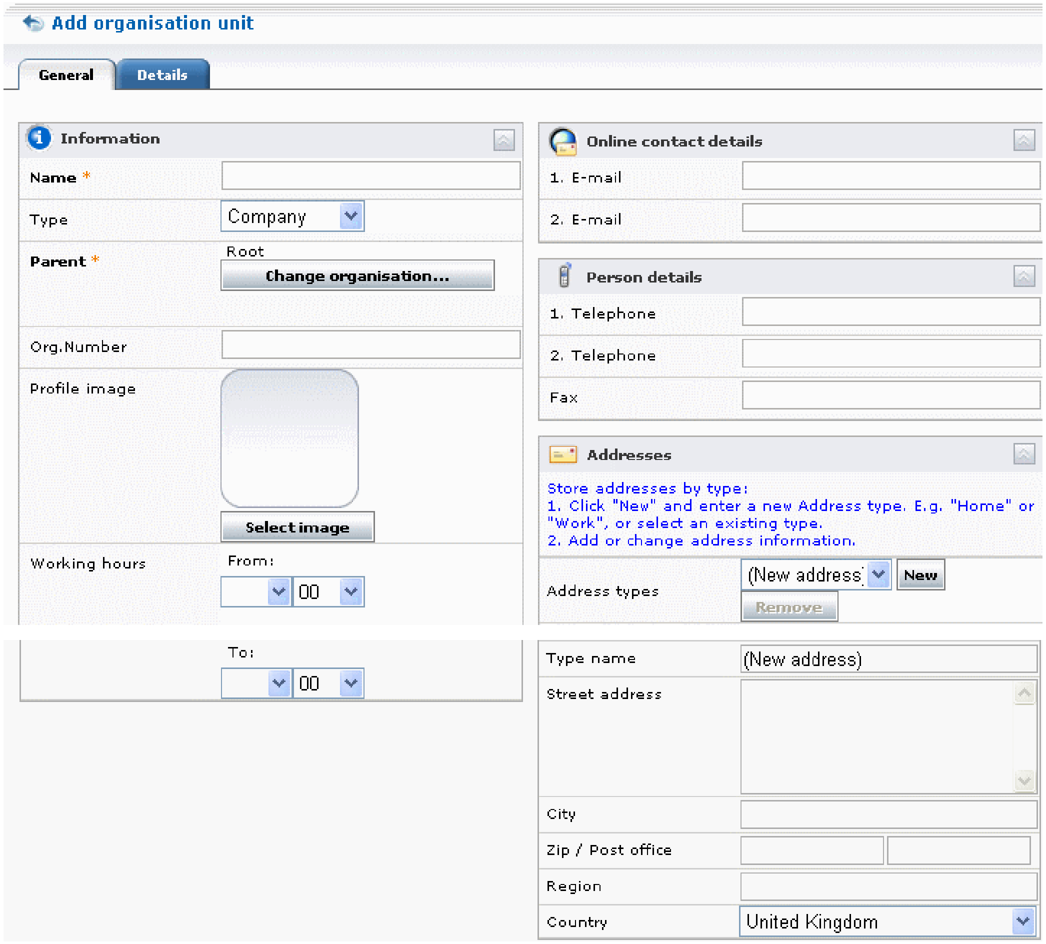


Figure 9: Add organisation unit

Step 3: When you have defined the properties of the sub company, select **Save** and the sub company is created.

You can now enter yet another sub-company beneath the one you have just created. If required you can continue adding sub companies to create a complex multi-level hierarchy. You can also choose to add a department to the new sub company.

1.3 How to Add a New Person

Select the **Main Menu Settings** tab, then In Workspace click on Add person from the shortcuts.

Figure 10: Content Workspace

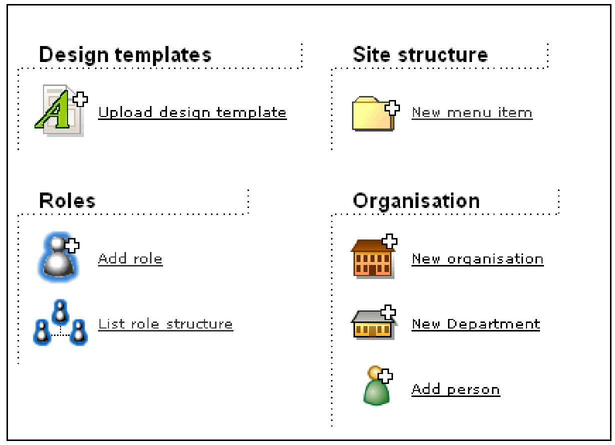


Figure 11: Settings Workspace

Clicking the icon next to the **Users and Target Groups** element in **Settings** or **Content Explorer** displays a pop-up menu. Choose **Add organisation**.

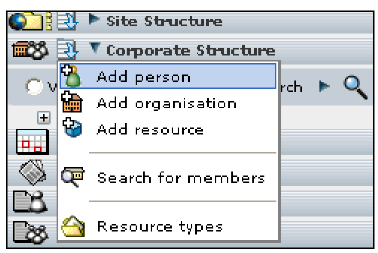


Figure 12: Settings Explorer

In **Corporate Web Site Structure** element, locate the organisation or department that you want to add a new user in, then select **Add person** from the pop-up menu.

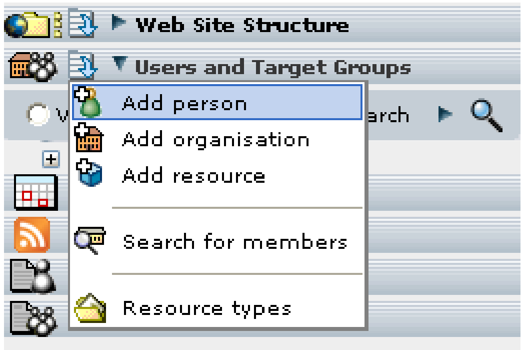


Figure 13: Add person - Explorer

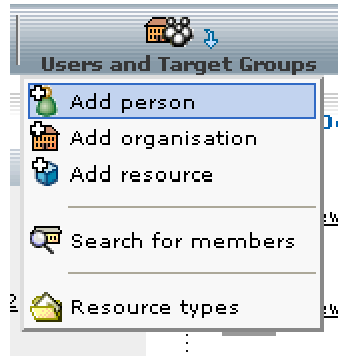


Figure 14: Add person - Submenu

In the **Settings submenu** or **Content submenu**, position the mouse over the **Users and Target Groups** menuitem. A pop-down menu will then appear. Choose **Add person**.

A window will now be displayed where you can enter personal information for an individual. Fields marked with a red star are compulsory and necessary to fill out in order to register a new person.

Note! All new users have to be added to a department in a department or company/sub company. This facilitates the management and organization of large numbers of site users.

General Tab

- **Person details** allows you to enter the personal details of the person.
- **Credentials** allows you to enter login information for the person.
- **Online contact details** is where you should enter online contact information for the person such as ICQ number, yahoo or msn ID.
- **Phone numbers** allows you to enter the person's telephone numbers.
- **Addresses** allows you to store the person's addresses.

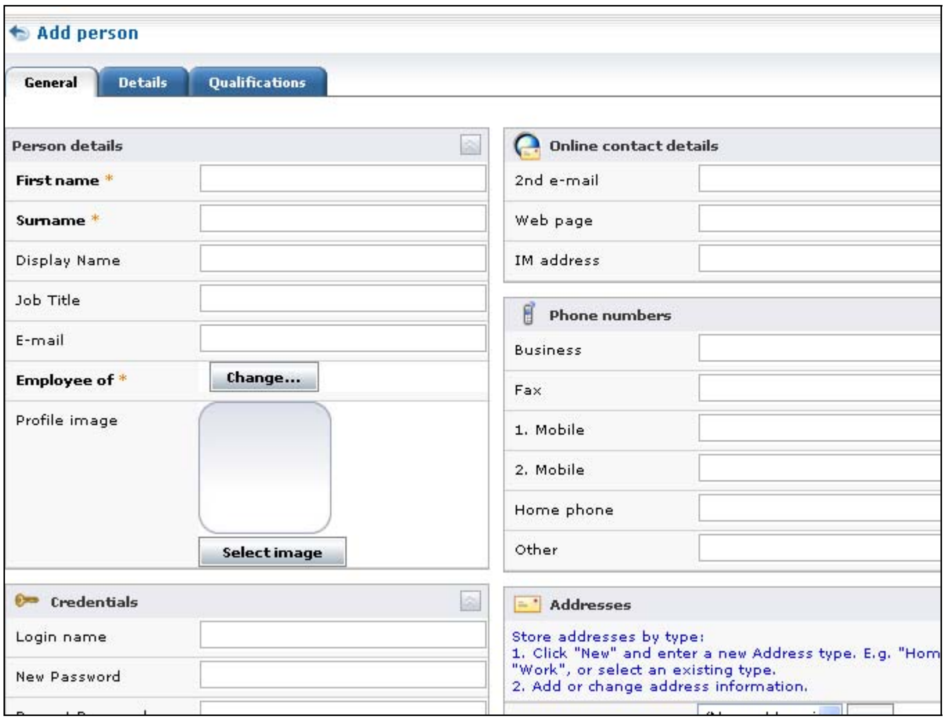


Figure 15: Add Person – General Tab

Detail Tab

A range of other user related information can be defined for an individual in the tabbed sections Details. In the section Regional settings you may choose a standard language for your Digimaker.

Note! You need to click Apply before these changes reflects on your page.

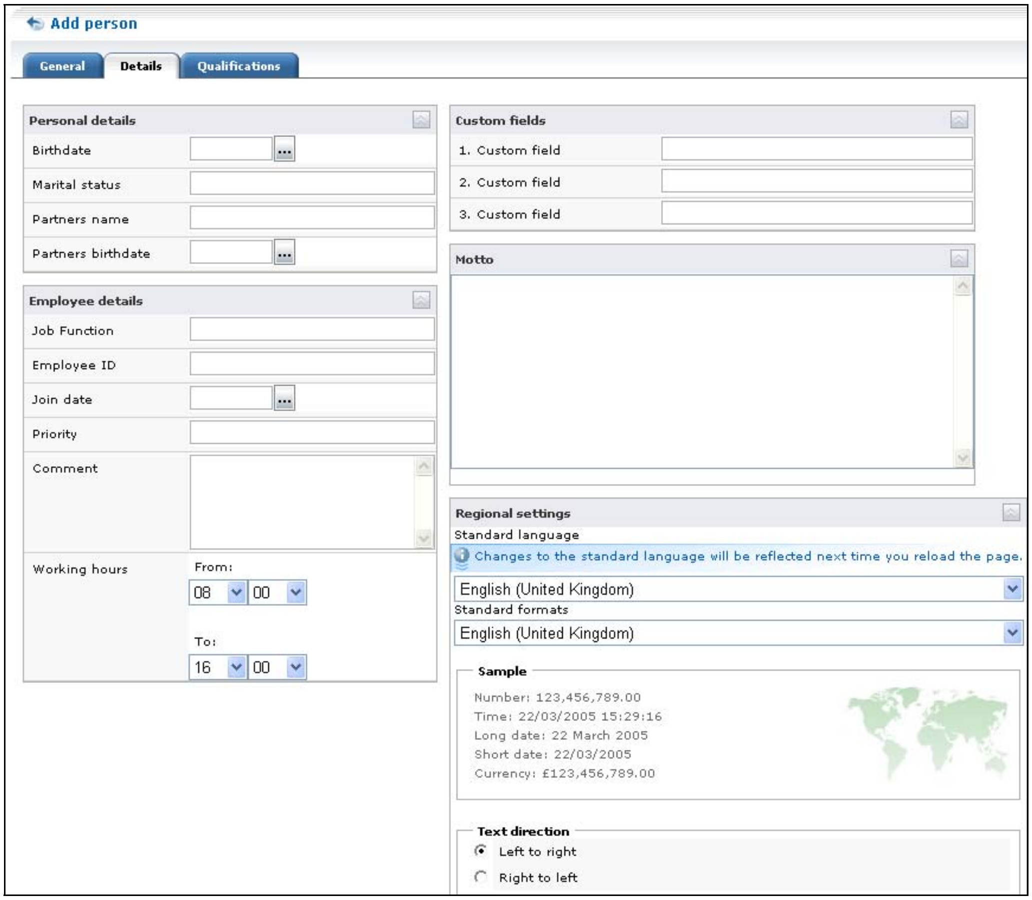


Figure 16: Add Person – Details Tab

Qualifications allows you to add the person's qualifications. The field requires content similar to a typical resume.

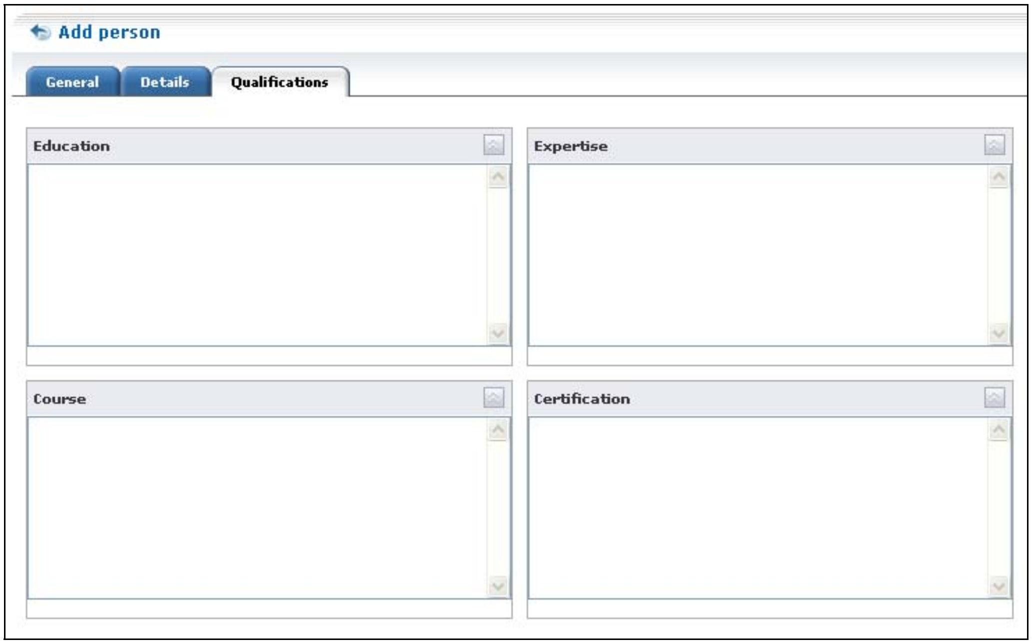


Figure 17: Add Person - Qualifications Tab

1.4 How to Create a New Role

Defining a set of Roles allows you to create an administration hierarchy for managing your site. Each role comes with a set of privileges and access rights. Roles are used to restrict menu items and categories to users with a specific role.

The Roles submenu in the **Settings** menu allows you to create different roles to perform different functions.

To add a role within an existing role,

Step 1: Select the **Main Menu Settings** tab and in Workspace, click on **Add role** from the list of shortcuts.

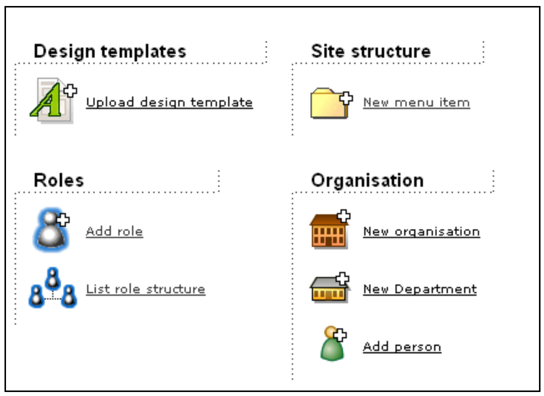


Figure 18: Shortcut menu to create a new role

Go to the **Settings Explorer** and click on the icon next to **Roles**. Select **Add new role** from the pop-up menu.

Figure 19: Settings Explorer – Add new role

Move the mouse over the Roles submenu under **Settings**. Select **Add new role** from the pop-up menu.

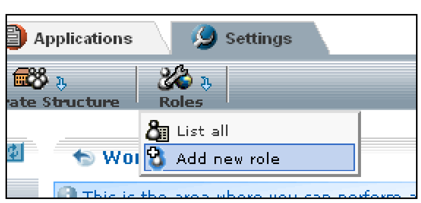


Figure 20: Roles Submenu – Add new role

Step 2: Expand the Roles menu in **Settings Explorer**. All the existing roles are displayed.

Step 3: Move the mouse over the role under which you want to add the new role.

Step 4: Click to display the pop-up menu and select **Add Role**.

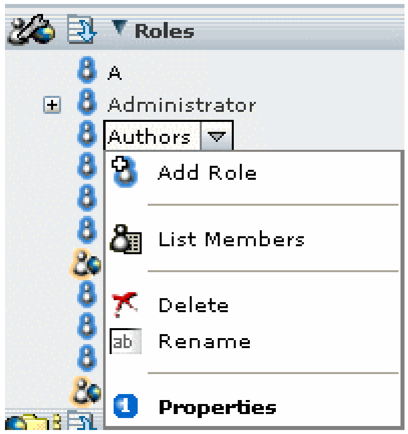


Figure 21: Add Role through Settings Explorer

The **Add new role Workspace** (*Figure 23*) is divided into two sections. The first section deals with the general information about the role such as name, role privileges, and the hierarchy definition.

The second part consists of, what can be called as the 'role management' section.

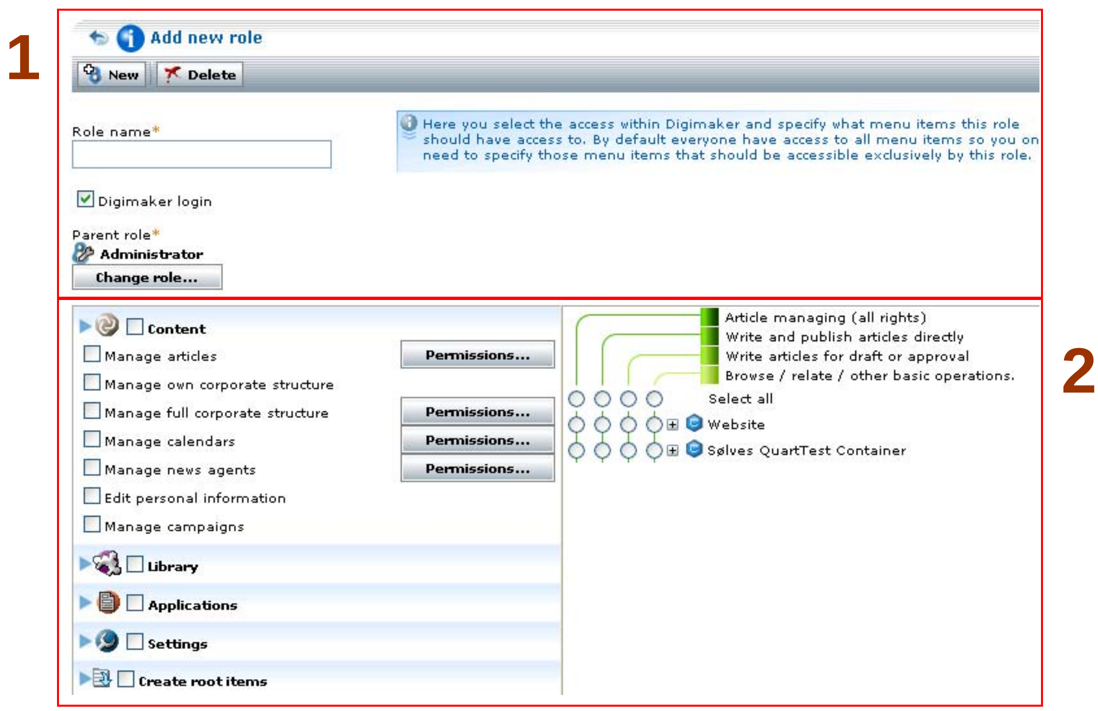


Figure 22: Add a new role

Role name allows you to enter the name of the role. It is recommended that you provide a unique name which reflects the responsibilities associated with the role.

Digimaker login allows you to select the check box to allow the role to login to Digimaker. Roles that do not have this check box selected cannot login to Digimaker and are considered as Public roles. These roles have permission to login to restricted parts of the website.

Select parent role A Parent role is one that has a child role associated with it and has all the privileges included. By default the role 'Administrator' is created when Digimaker is installed. All the new roles are created under the Administrator role.

To change the parent role, click **Select parent Role**. A pop-up window is displayed listing all the available roles. You can define the position of the new role in the role hierarchy by:

- Selecting any one of the existing roles as the Parent role.
- Selecting 

to place the role at the top level in the hierarchy.

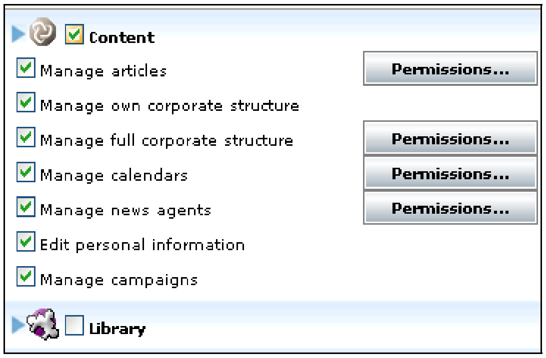
Notes! The 'Administrator' role that comes with the system will not be displayed in the tree structure of the Roles menu in the Settings Explorer. You can create a role named 'Administrator' and provide all the privileges that the default administrator role has.

Part – II (Role Management)

This section allows you to define the privileges of each role. You can set access limits to each of the main menus and the associated functions. All the main menus are listed one below the other. By default only the functions of content menu is displayed. Most of the functions have a 'Permissions' button associated with them where you can drill down the rights for the role to a greater degree of specification.

Content

Select all the functions or only those functions which you would like to assign to this role from the following list:



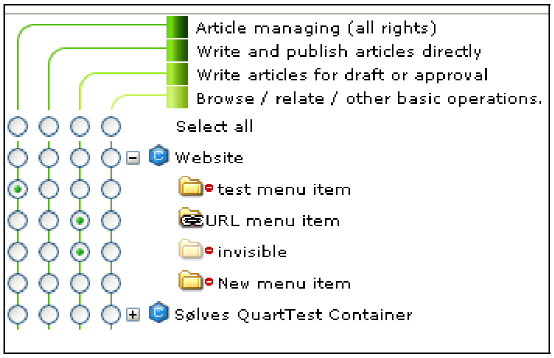


Figure 23 Content Menu Management

Figure 24: Permissions for managing articles

Manage articles allows you to permit the user to manage articles. You can further restrict the access rights using the Permissions button (by default the permissions window is displayed) as shown in Figure 24. You can deny/allow the user access to all or some of the menu items containing the articles, using the four levels of privileges.

By default granting access to a menu item includes all the submenus under it. If you want to restrict access to certain submenus then expand the parent menu item and grant the access rights using the radio buttons.

Browse/relate/other basic operations

The menu item is visible in the tree structure of Web Site Structure. Permission to list and read articles in the menu item, and relate these articles to other areas where the user has access rights granted.

Write articles for draft or approval

All the rights of **'Browse/relate/other basic operations'** plus permission to **create/add** new articles and edit articles but cannot publish those articles.

Write and publish articles directly

All the rights of both **'Browse/relate/other basic operations'** and **'Write articles for draft or approval'** with the additional permission to publish articles directly. However, there is no permission to approve other user's articles.

Article managing

This has the super-user rights. It includes all rights and excludes none which means that it includes the permission to approve other user's articles as well.

Manage Own Users and Target Groups includes all permissions/access rights to manage only the organization that the role belongs to. This means that the role has manage rights to **My Org** in the **Users and Target Groups**.

Manage full Users and Target Groups Click on the **Permissions** button to set access rights to all or any of the organization in the **Users and Target Groups**.

Figure 25: Corporate managing

Manage calendars Click the **Permissions** button to set access rights on all or any of the categories in the calendar module using the three levels of privileges.

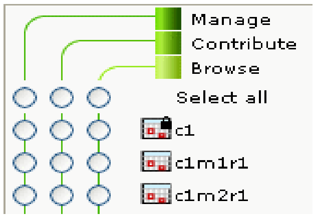


Figure 26: Manage calendars

Manage

Full access rights to view the calendar, add new events and manage all events including those events that are created by others.

Contribute

Browse rights plus permission to manage only those events owned by the role; cannot manage events owned by others

Browse

The calendar category is visible in the Calendar listing. Permission to view calendar and events; cannot edit or add an event.

Manage RSS Feeds

Click on the permissions button to set access rights on all or any of the categories in the **RSS Feeds** module using the two levels of privileges **(Figure 28)**.

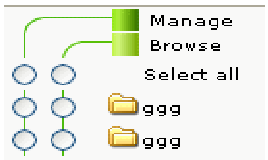


Figure 27: Manage RSS Feeds

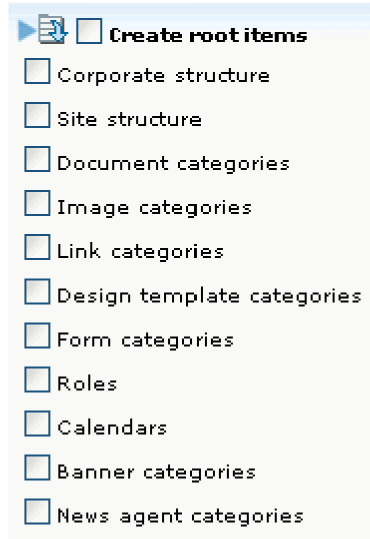


Figure 28: Create Root Items

Browse allows permission to view the contents; cannot edit or add a **RSS Feed** to the category.
Manage allows you full access rights to view all RSS Feeds and manage the category.
Manage campaigns means that there are no permissions to set for the role. Selecting this option enables the user to directly manage the campaigns module.

Step 5: Expand the other main menus and follow the procedure detailed in **Step 2**.

Step 6: Other than providing access rights on the categories and menu items you can also grant permission to create root items for any or all of the categories. Root items are categories or menu items that are placed at the top-most level in the tree structure. For example you can choose to grant permission to create a root item for only Document categories to a role. Selective permission allows you to take an organized approach in maintaining the tree structure.

Step 7: Click **Save** to save the role that you have created and leave the Add new role workspace.

Note! If you want to add more roles then click Apply and click on the New button placed at the top of the Add new role workspace.

1.4.1 Adding Persons to a Role

There are two ways to add a person to a role. The easiest way to add a person is to edit the personal details of that person and associate him to a role which is explained in method 1.

Method 1:

Step 1: Select Content menu from the main menu and expand **Users and Target Groups** from **Content Explorer**. A list of organizations is displayed.

Step 2: There are two ways in which you can access the Edit page of the person's details:

- Expand the organization and the list of members is displayed. Click on the person's name or click on the downward arrow and select **Edit**. The details of the person are displayed in the Edit mode.
- Enter the name of the person in the search box and click **Search** to directly go to the Edit page of the person's details.

Figure 29: Search person

Step 3: Click **Select Roles**. This displays all the available roles.

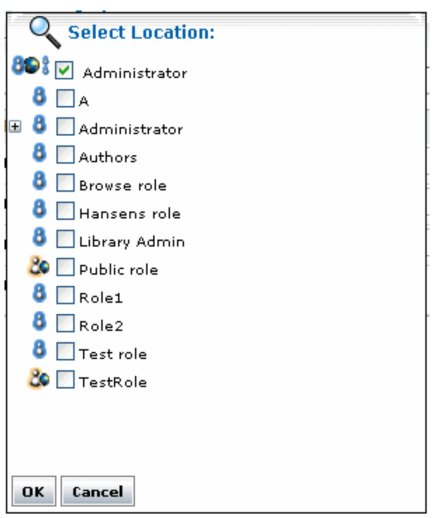


Figure 30: List of Available Roles

Step 4: Select the role that you want to associate this person with from the list of roles and click **OK**.

Step 5: Click **Save** to save the changes.

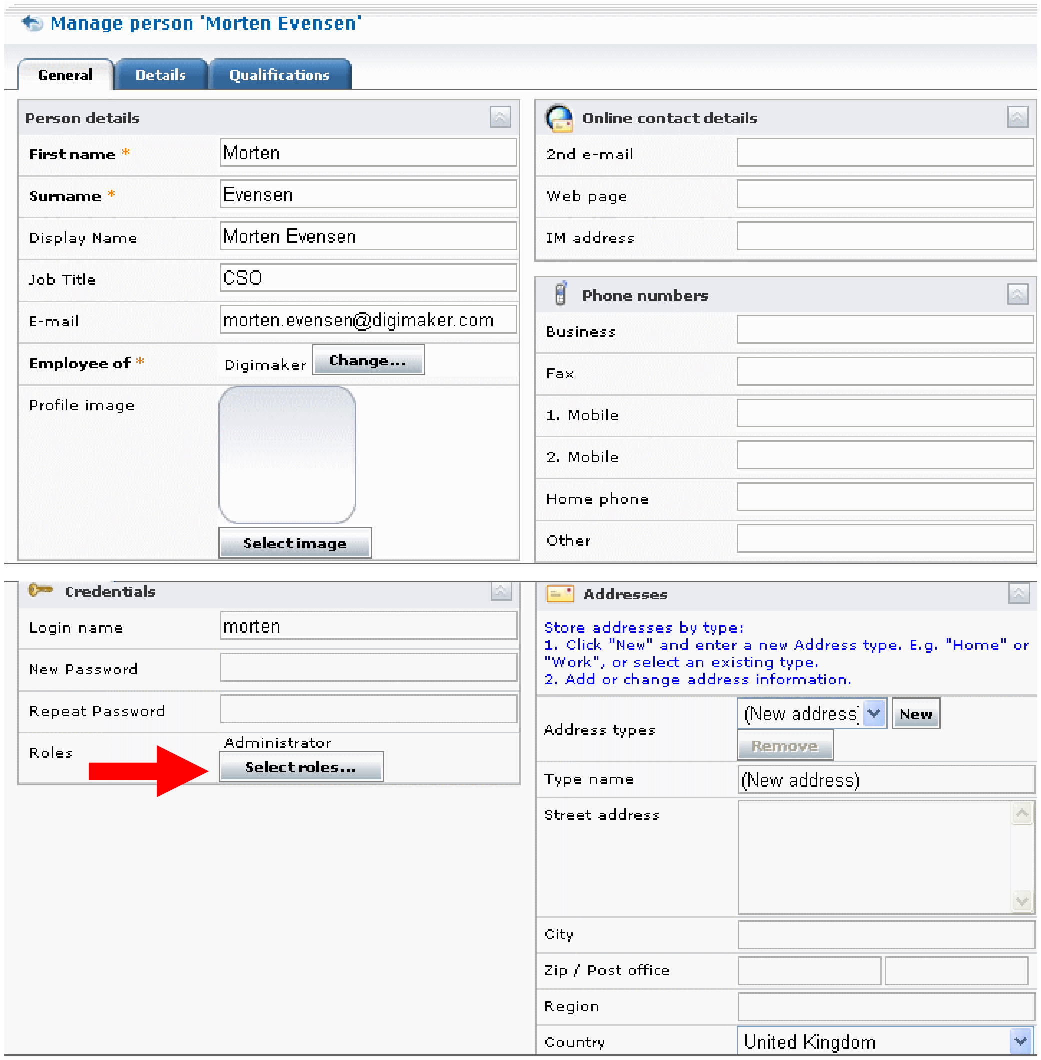


Figure 31: Manage Person – Select Roles

Method 2:

Step 1: The first step in adding a person to a role is to access the list of all available roles. The List all option displays all the roles in the system. There are two ways that you can access:

- Go to the **Roles sub menu** in the **Settings menu** and select **List all** from the menu.
- Click on the icon next to **Roles** in the **Settings Explorer** and select **List all** from the menu.

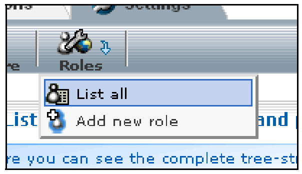


Figure 32: List all option

Step 2: Select the role to which you want to all persons from the list of roles.

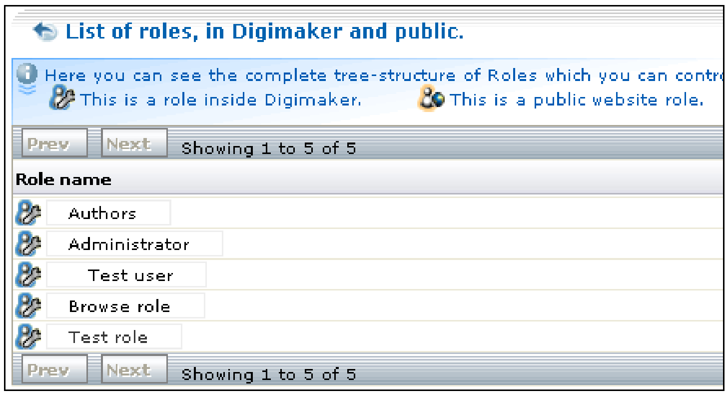


Figure 33: List of roles

Step 3: A list of members belonging to role (or an empty list if no persons are added) is displayed. If there are no members then an empty list is displayed. Click on the **Add** button.

Figure 34: Listing members belonging to a role

Step 4: Select **View all** in the **Users and Target Groups section** of the **Content Explorer**. All the available organizations are displayed. Navigate through the **Users and Target Groups** until you find the org/department where the users you want to add are listed.

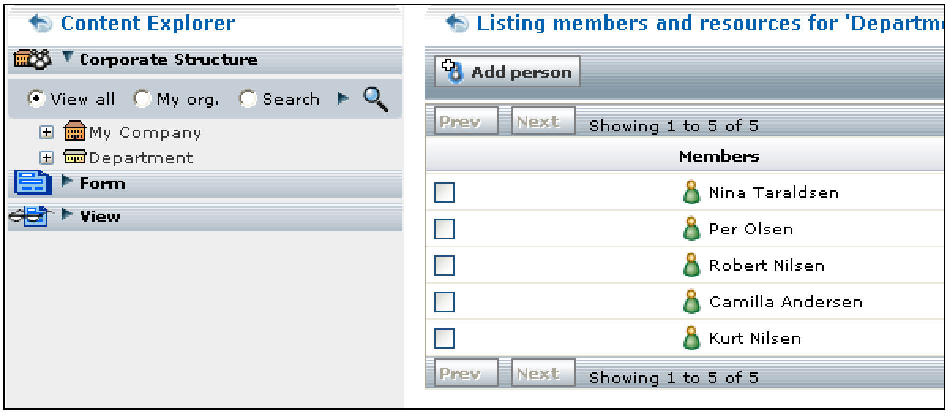


Figure 35: Users and Target Groups

Step 5: Select the persons that you want to add using the check boxes and click **Apply** at the bottom left of the window.