

How to Set Up Roles and Responsibilities on a CMS

Scenario:

A simple setup with: a system admin, two users able to create and publish content, and a receptionist who only needs to change the welcome message.

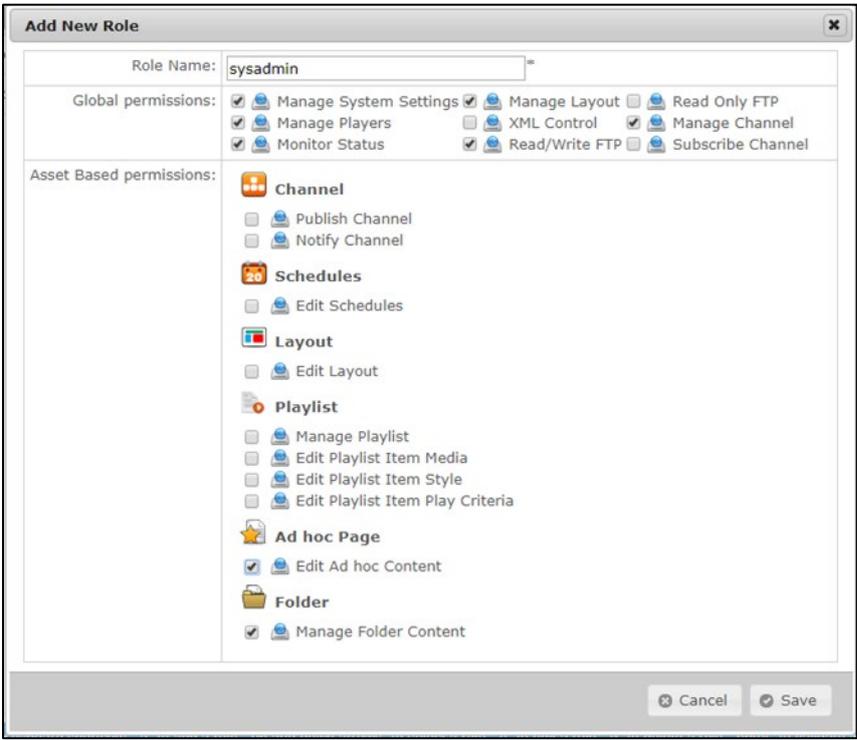
User	Responsibility	Required Abilities
Jenn: System Administrator	Managing the whole digital signage system	Needs to be able to control the whole system, including setting up the displays and players
Stella: Designer Amber: Designer	Creating and publishing content	Has to be able to create and edit playlists, layouts and channels, as well as having the permission to publish channels
John: Receptionist	Creating a welcoming environment for guests	Should only be able to change the welcome message and company logo on the reception display

- **User:** the user is a person's user account (the credentials used to log into the CMS).
- **Role:** a role is associated with a user account (the same role can be applied to multiple users) and determines the permissions granted to a user.
- **Permissions:** a permission grants a user control over or access to a particular function of the CMS.
 - **Global:** system-wide permissions that will grant a user the ability to, for example, manage all channels.
 - **Asset-based:** these permissions are applicable only to assets. For example, to just edit layouts. Granting an asset-based permission to a role doesn't enable access to those assets by default. You must manually enable a role's access (navigate to an asset's **Permissions** tab and ensure the desired role is ticked) if you have granted asset-based permissions rather than global ones.

To create the relevant roles and users to be associated with them, log into your CMS as the remote user. Now, navigate to the **Setup > System > Roles** page. Click on the  button and follow the instructions below to ensure that the roles you create have the correct permissions to grant them the access required for their responsibilities.

1. System Admin

Jenn, the system admin, has to be able to manage the whole system including setting up the players connected to it and monitoring their statuses.



Add New Role

Role Name:

Global permissions:

- Manage System Settings
- Manage Players
- Monitor Status
- Manage Layout
- XML Control
- Read/Write FTP
- Read Only FTP
- Manage Channel
- Subscribe Channel

Asset Based permissions:

- Channel**
 - Publish Channel
 - Notify Channel
- Schedules**
 - Edit Schedules
- Layout**
 - Edit Layout
- Playlist**
 - Manage Playlist
 - Edit Playlist Item Media
 - Edit Playlist Item Style
 - Edit Playlist Item Play Criteria
- Ad hoc Page**
 - Edit Ad hoc Content
- Folder**
 - Manage Folder Content

Her role requires the following permissions:

- Global permissions:
 - **Manage System** settings: this gives Jenn full control over the items on the **Status** and **Setup** menu pages. It also grants access to the **Media** page for items such as newsfeeds, fonts, and files & folders.
 - **Manage Layout**: with this permission, Jenn will have full control over items on the **Media**, **Playlists**, **Layouts** and **Schedules** menu pages. She may not be creating any content herself but this permission means that she will be able to oversee the system.
 - **Manage Players**: this permission means that Jenn can access the **Manage Players** page which is essential for central management of players such as NTB and SoC devices.
 - **Manage Channel**: grants Jenn full control over the **Channels** menu page.
 - **Monitor Status**: gives access to the **System** status and **Manage Channels** pages.
 - **Read/write FTP**: with this permission, Jenn will be able to read, write and delete files in the **Media** folder and all its subfolders using file transfer protocol.
 - These global permissions have the additional benefit of allowing Jenn to change the asset based permissions of other people's roles. This means that she can restrict the access of other members of his organisation to specific areas or items if necessary.
- Asset based permissions:
 - **Edit Ad hoc Content**: this allows Jenn to add or delete content on the **Ad hoc Entry** page (not the ad hoc content design pages).
 - **Manage Folder Content**: this gives Jenn the ability to add or delete folder content.

With all these permissions ticked and the role name filled in, click **Save**.

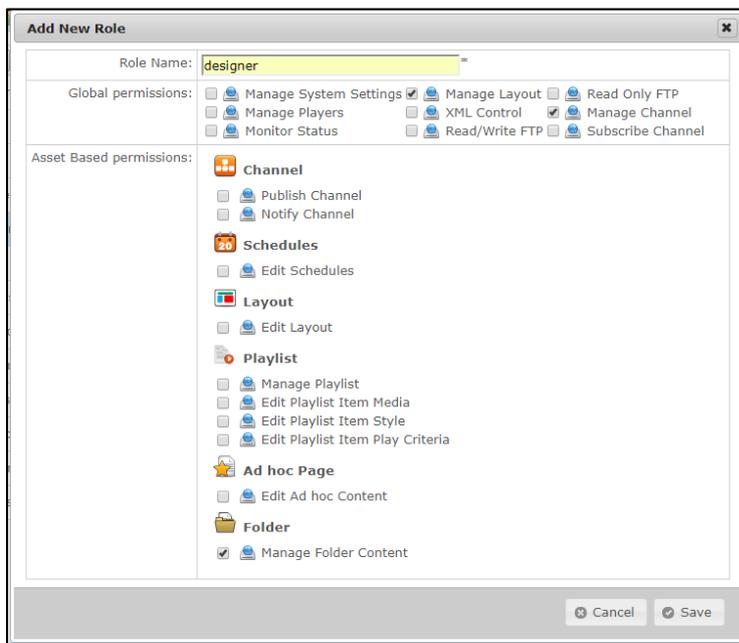
Now you will need to create a user and assign this role to it.

To do so:

1. Click on the **User** tab.
2. Click the  button.
3. Fill in the username (e.g. jenn) and give them a password.
4. Click **Next**.
5. Tick the appropriate role, in this case **sysadmin**.
6. Click **Save**.

2. Designer

Amber and Stella have the same responsibilities and required access. Therefore, you can create one role called **designer**. You can then add two users, **amber** and **stella**, and assign the designer role to both of them.

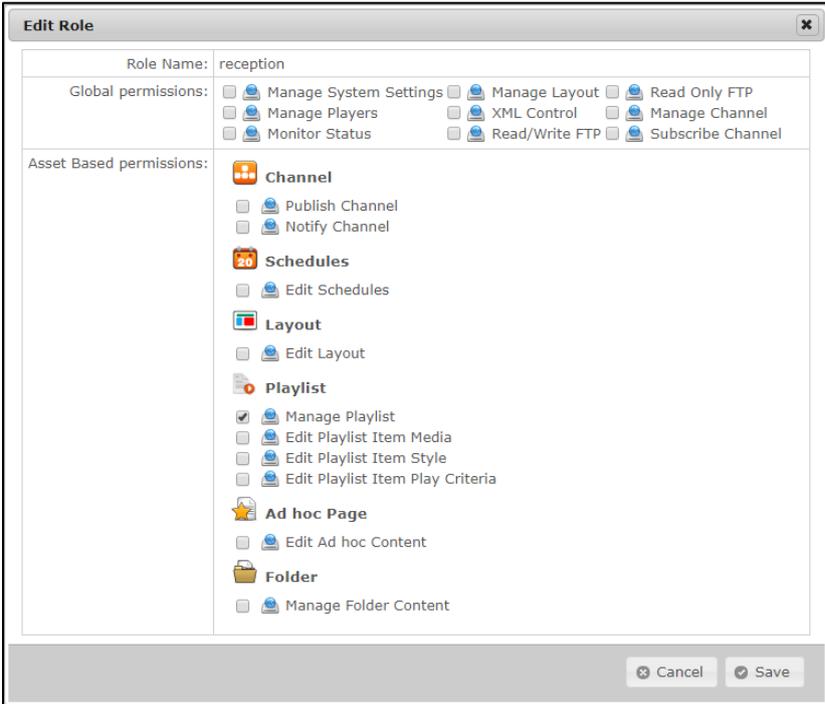


This role requires the following permissions:

- Global permissions:
 - **Manage Layout.**
 - **Manage Channel.**
- Asset based permissions:
 - **Manage folder content.**

3. Receptionist

John only needs very limited functionality on the CMS.



Edit Role

Role Name: reception

Global permissions:

<input type="checkbox"/> Manage System Settings	<input type="checkbox"/> Manage Layout	<input type="checkbox"/> Read Only FTP
<input type="checkbox"/> Manage Players	<input type="checkbox"/> XML Control	<input type="checkbox"/> Manage Channel
<input type="checkbox"/> Monitor Status	<input type="checkbox"/> Read/Write FTP	<input type="checkbox"/> Subscribe Channel

Asset Based permissions:

- Channel**
 - Publish Channel
 - Notify Channel
- Schedules**
 - Edit Schedules
- Layout**
 - Edit Layout
- Playlist**
 - Manage Playlist
 - Edit Playlist Item Media
 - Edit Playlist Item Style
 - Edit Playlist Item Play Criteria
- Ad hoc Page**
 - Edit Ad hoc Content
- Folder**
 - Manage Folder Content

Cancel Save

The only permission his role requires is **Manage Playlist**. Once his role and user have been created, a user such as Jenn with her system admin role would then select the appropriate playlists (the text zone for the welcome message and the image zone for the company logo, for example) and grant him access to them.

