

DKAN Quick Start Guide

Managing Users and Groups

Information in this document contains excerpts from the comprehensive DKAN manual available at <https://docs.getdkan.com/en/latest>

Introduction

On DKAN, what you can do on the site depends on the permissions given to the role assigned to you. User roles and permissions maintain the security of your site.

Roles and Permissions Overview

The following is a list of each role used in the environment data portal, with a description of its purpose and a general description of what the role is able to do. Multiple roles can be assigned to a user, but generally they are in a hierarchy where any higher level role has equal and greater permissions of a lower level role.

Anonymous User

This is any site visitor accessing the site who is not logged in. Anyone who is not authenticated is an anonymous user. It is sometimes useful to log out of your account to view pages as an anonymous user will see them.

Permissions:

View and search published content

Content Creator

Content Creators are the most common users who will have access to login and provide datasets to be published on the environmental data portal. These users should also be members of a group, which would typically be the government agency they are employed by.

Permissions:

- Create datasets and resources
- Edit datasets and resources related to their group.
- Create visualizations (charts)
- Edit own visualizations

Site Manager

This role is the highest level possible for non-technical users. A Site Manager performs administrative functions, and is a role best suited for a supervisor, manager, or other trusted upper-level employee. The Site Manager is provided with a sweeping overview of the site as well as its content and users. However, they do not deal with the technical back-end configuration or code.

Permissions:

- Create, edit and delete datasets and resources associated with any group.
- Create, edit and delete visualizations (charts).
- Create, edit and delete standard webpages, dashboards and stories.
- Create and manage groups
- Change menu structure
- Administer users
- Configure Harvests

Administrator

Administrators hold the highest level of all roles and permissions and have no restrictions. Administrators are able to modify settings of the underlying Drupal platform, and can modify most things of the site to meet user needs. This role is for a web professional with high technical competency and a good understanding of how Drupal works.

Permissions:

- Modify themes and layouts, and enable or disable modules.
- Modify Drupal settings

Adding New Users

As a Site Manager, a core piece of your role involves adding users to the site.

You can add new users by clicking on the People link and choosing the Create user menu item for quick access or the main People page.



Add user

People

[List](#) [Permissions](#)

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not certain news or notifications by e-mail.

Password *

Confirm password *

Provide a password for the new account in both fields.

Status

Blocked

Active

Roles

authenticated user

administrator

editor

site manager

content creator

Password strength: _____

New user form

Key information when adding a new user

Username: Create a unique username to create a new user account. The user can change their username once they're logged in as long as it's still unique, but you'll have to choose a name to begin with for the user to first access the site.

Email address: This is how the user will be contacted with notifications about their account and how they can recover a lost password. Choose an email that they are likely to check on a regular basis.

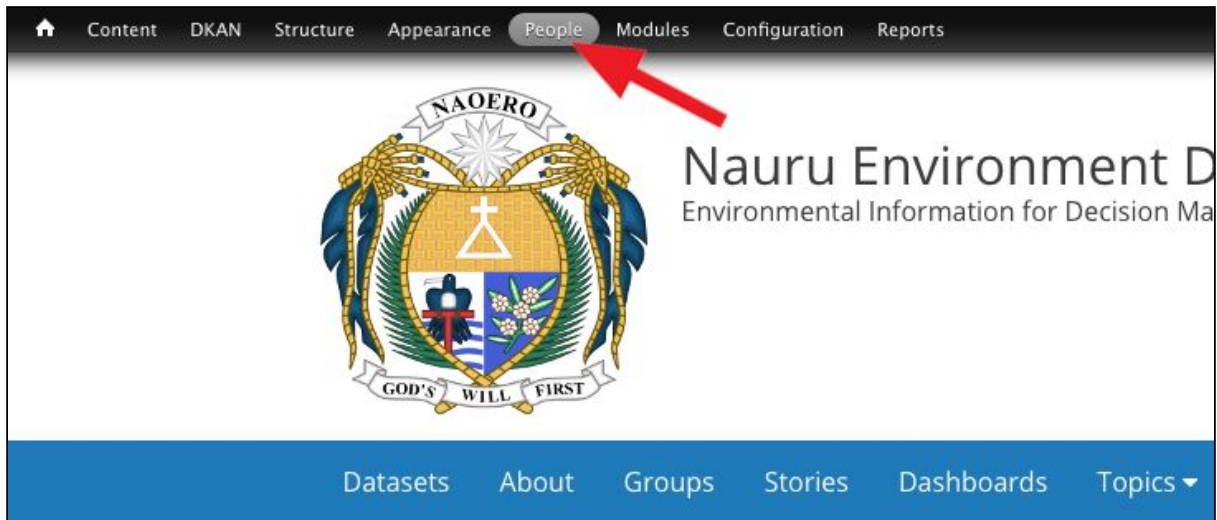
Password: The user should change whatever you originally enter for the password, but you'll need to choose the initial password so that the user can login to their account and change the profile information.

Roles: As you're adding a new user you'll choose which role that person should have from the list of user types detailed in another section. Choosing a role might be obvious in some cases, but in other cases it may be less clear. The role you assign will depend on how much a person needs to do with the site. Higher-level access roles automatically have all the permissions of lower-access roles, but in general we recommend erring on the side of lower-access.

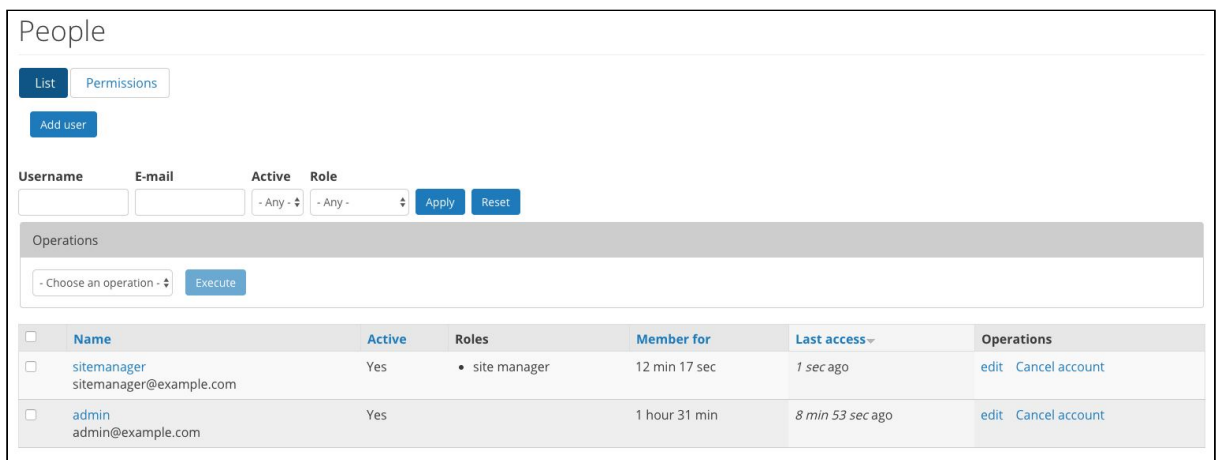
Once you click the Create new account button at the bottom the page, the account is created and can now be managed with other existing user accounts.

Managing existing users

Site managers can manage users by clicking 'People' in the Admin Menu. From this screen you can see all existing users, their roles, and details about their account, and by clicking on individual users you can additionally see all the content the user has created. You can also edit their account to change details, add or remove a role, add them to Groups or cancel an account.



Accessing the User Management Page



The User Management Page

Editing an existing user's account

The displayed list of users on the User Management page can be filtered and sorted using the filters at the top of the page. Once you've found the user you wish to edit in the user table, click the "edit" link at the end of that user's row.

On the resulting "edit user" page, you can edit the user's username, email, or profile information. You can also set a new password for the user. Click the "Save" button at the bottom of the page to save your changes.

sitemanager

View Edit

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password
 Password strength: _____

Confirm password

To change the current user password, enter the new password in both fields.

Status
 Blocked
 Active

Roles
 authenticated user
 administrator
 editor
 site manager
 content creator

The 'Edit User' page for the sitemanager user

Blocking a user or canceling an account

At some point, a user account may need to be deleted or blocked. Typically this is for internal employees who move on from the organization, but there are occasions involving external users. There are a number of options for canceling an account or blocking a user to meet a number of scenarios.

Block an account

Blocking an account is the most simple and straightforward way to suspend an account. Blocking a user account keeps a user from logging in, and accounts can easily be unblocked. A blocked account only means that a user cannot login to their account and access your DKAN site. All of their content and profile details will remain, so nothing is lost if you want to unblock an account and restore access.

By blocking an account, you keep users from creating a new account with the same details and avoid repeating the blocking process.

sitemanager

View Edit

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password
 Password strength: _____

Confirm password

To change the current user password, enter the new password in both fields.

Status
 Blocked
 Active

Roles
 authenticated user
 administrator
 editor
 site manager
 content creator

Block an account

Cancel an account

Canceling an account can be a permanent action, and there are several options to choose from. Some of the actions cannot be reversed, so you should be careful when deciding which option to choose. Below are the options for canceling an account and the implications of selecting the option. While Site Managers can cancel the account of any user on the site, users may also cancel their own accounts.

Group membership

Your groups

Associate this user with groups you belong to. [Show row weights](#)

Other groups

As groups administrator, associate this user with groups you do *not* belong to.

Cancel Account

Are you sure you want to cancel the account *tempuser*?

When cancelling the account

- Disable the account and keep its content.
- Disable the account and unpublish its content.
- Delete the account and make its content belong to the *Anonymous* user.
- Delete the account and its content.

Require e-mail confirmation to cancel account.

When enabled, the user must confirm the account cancellation via e-mail.

Select the method to cancel the account above. This action cannot be undone.

Cancel account [Cancel](#)

Cancel account options

Disable the account and keep its contents:

If you disable the account, the details of the profile remain in tact but the user is blocked from accessing the site with their user login. By keeping the contents, any content that the user published will remain on the live site. Because the account is only disabled (blocked) the user remains as the author of the content and the profile details may still be accessed. This option is similar to just blocking an account, and it's a good temporary measure in most cases.

Disable the account and unpublish its contents: This option blocks the user from accessing the site and all the content that the user has published will be unpublished. This means that their content will not appear on the live site, but it will still exist behind the scenes. It can be managed out of public view and in the mean time, the user cannot do anything else on the site. This is a good option if you need to review the content a user has published and need it to be off the site but still need to access it.

Delete the account and make its contents belong to the Anonymous User: This is a permanent action. Once you delete an account, you cannot recover any of the details that were associated with the user profile. With this option you can delete the entire account as well as keep its contents. Because the account associated with the user who was the original author no longer exists, the content must be assigned to a different author. This option quickly changes the author so that the content remains on the live site, and you can change the author at any time. Again, this is a permanent option so be careful before making this selection.

Delete the account and its contents: This is a permanent action and **the most severe choice** when canceling an account. This options not only deletes the user account and all the profile details, it also deletes all the content the user added. Neither the account nor the content can be recovered with this selection. As a general best practice, we recommend never deleting content if it can be edited or simply unpublished.

Require email confirmation: For any option you choose when canceling an account, you can make sure the user is aware by requiring email confirmation. An email will be sent to the email address provided in the user's profile details. When you check the Require email confirmation box, the account won't be canceled until the user confirms through the email.

Group Roles and Permissions

With large sites there is often a need to have a subset of the content managed by a specific list of users. Think of a large agency or department with sub-departments or programs that produce content. With Groups, you can silo content and users so that the different departments can easily manage and control only the content they are producing.

To keep content organized and in the hands of its owners, and without introducing the risk of inadvertent (and sometimes irreversible) actions, Group-level permissions give users the ability to do things they couldn't necessarily do on the site outside of the Group.

About Group roles and permissions

After adding a new Group, Site Managers can assign Datasets (and their Resources) to that Group. You can also manage the members of a Group, adding new members and giving certain members different roles.

Members of a Group are bound by the permissions of their role and restricted to the content in their Group. As a Site Manager you have access to all Groups and are not limited by the permissions of the Group.

Within Groups there are different levels of access a user can have, which determines another level of permissions. Any user who belongs to a group falls into one of two types: Member or Administrator. Users not in the group are considered Non-members.

Nonmember

A Nonmember is any user on the site who does not belong to the Group.

Permissions:

Request membership in the Group
View Group members and content.

Member

A Member is a basic user within the Group who is mostly adding and editing their own content for the Group.

Permissions:

Add content to the Group

Edit own content within a Group (Content assigned to a Group can only be edited by members of that Group)

Administrator

An Administrator of a Group plays a similar role to that of an editor. They manage the team of users associated with the Group, and can edit any of the content. It's good practice to have only 1 or 2 users in this role for any given Group.

Permissions:

Edit all content assigned to the Group (Cannot modify content in other Groups)

Add Group members and assign group roles

Add Group Members

For basic members of a Group, there are two ways that you can add a user to a Group: from the user profile and from the Group page.

Add a user by editing their user profile:

This way of adding users to a Group is preferred if you are the Site Manager but not the Group Administrator. The Group Administrator should be aware and approve of incoming members. You can submit a request for a user to a Group by selecting the Groups on the user's profile page.

By adding a user to a Group from the user's profile page, a request is sent to the Group Administrator on their behalf for the Administrator to approve.

Edit the user's profile who you want to add to the Group and scroll to the bottom of the page. In the section Group membership section there are two fields, Your groups and Other groups.

Your groups: These are Groups that you are a member of. Users are not automatically added to Groups, so Groups won't appear in this field unless you add yourself to a Group.

Other groups: These are simply Groups that you are not a member of. As a Site Manager, you can add any user to a Group regardless if you are a member yourself. But the Group names will not automatically appear like in the Your groups field, so you will have to know the name of the Group to enter it in the Other groups field.

Once the right Groups have been selected, click the Save button at the bottom to submit the requests.

The screenshot shows a user profile page with the following sections:

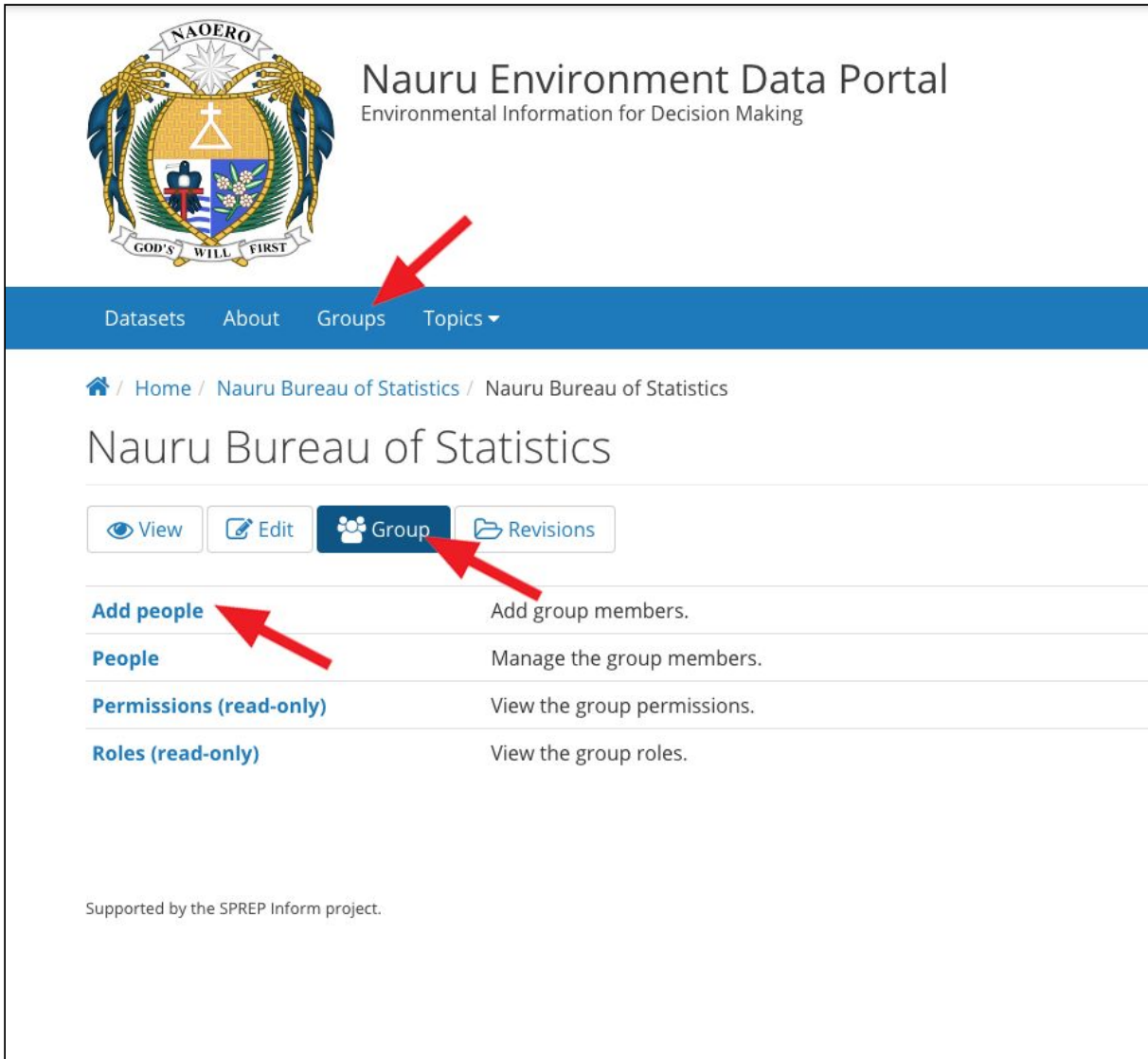
- Picture**
 - Upload picture**: Includes a "Choose File" button (No file chosen), a note about image size (220x220 pixels, max 2MB), and a checked checkbox for using a valid Gravatar.
- Locale settings**
 - Time zone**: A dropdown menu showing "UTC: Friday, February 2, 2018 - 00:36 +0000".
- Group membership**: A section with a red arrow pointing to its header. It contains:
 - Your groups**: A dropdown menu currently showing "- None -".
 - Other groups**: A list of groups with a plus sign and a radio button. One group is visible: "Department of Commerce, Industry and Environment (42)".

At the bottom of the page are two buttons: "Save" (green) and "Cancel account" (blue).

Group membership selection from the user's profile page

Add a user from the Group page:

This option is best if you are the Site Manager and the Group Administrator. You can add user members directly from the main Group page by clicking the Group button and clicking the Add people link. On the next page, you can add users by pulling up an existing user and optionally choose if a member should be an Administrator member.



NAOERO
Nauru Environment Data Portal
Environmental Information for Decision Making

GOD'S WILL FIRST

Datasets About **Groups** Topics ▾

Home / Nauru Bureau of Statistics / Nauru Bureau of Statistics

Nauru Bureau of Statistics

View Edit **Group** Revisions

Add people	Add group members.
People	Manage the group members.
Permissions (read-only)	View the group permissions.
Roles (read-only)	View the group roles.

Supported by the SPREP Inform project.

Navigating to 'Add people' on the Group Page

People in group Nauru Bureau of Statistics

Add a group member to *Nauru Bureau of Statistics*

User name *

Roles

administrator member

Request message

This is the text a user may send to the group administrators.

Adding People on the group page

Begin typing an existing a user and a list of autocomplete options will appear to select from. A user must already have an account to be added to a Group, so if a person needs to be added you should first create a site account for them with the appropriate role.

By default a user will only have a Member role in the Group. To give the user an Administrator role and permissions, check the administrator member box. To finally create the user, click the Add users button at the bottom of the page.

Managing Group Members

You can manage Group members directly from the main Group page by clicking the Group button. From this page you can manage existing members by clicking the People link. The Group overview page lists all the members of a Group including pending members. From this page you can see how many members are in the group overall, the number of Datasets associated with the Group, access and edit individual member profiles, perform bulk actions and manage membership requests.

People in group Nauru Bureau of Statistics

Group overview

- Group manager: [sitemanager](#)
- Total members: 1
- Total content: 0

State Name

- Any - Apply

Enter a comma separated list of user names.

Operations

- Choose an operation - Execute

<input type="checkbox"/>	Name ▲	State	Roles	Member since	Request message	
<input type="checkbox"/>	sitemanager	Active		53 min 47 sec ago		edit

Group Overview Page showing members

Find members: All the members of a Group, including pending members, appear on the members list. There are two ways to find members: by State and by Name.

State: State refers to the status of a member. Active members are users who regularly add Datasets to the Group. Blocked members are unable to add Datasets to the Group and are not able to request membership. Pending members have requested to join the Group and

are waiting for approval from the Group administrator. Use the State drop-down menu to find users who fit a common state. This is helpful when you want to perform bulk actions on multiple users at the same time.

Name: Finding a member by name is a much more specific type of search. You can search for multiple members at the same time by entering the user names in the Name search field separated by commas. This type of search is helpful if you know which specific member you're looking for or if there is a specific group of members that don't have a common state but you want to perform a bulk action on that group of members.