

Managing User Rights

This tutorial leads you through adding users to CONTENTdm and assigning them user rights. User rights are special rights for working with CONTENTdm. User rights are not necessary for CONTENTdm users who only add files through the Project Client or the Add page within the CONTENTdm Web interface.

To successfully complete this tutorial:

- The CONTENTdm Server must be running.
- You must have the right to administer user rights. This is an administrator right within CONTENTdm that allows you to add and delete users and assign them user rights within CONTENTdm.

In this tutorial, we'll learn about the different user levels. Then, we will describe a possible scenario with a number of different users. We will add new users using the Administrator account. Finally, we will delete an existing user, edit collection-specific rights to existing users, and remove all CONTENTdm Administrator user rights from one user.

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Section I Before You Begin

This tutorial begins with the assumption that you are a CONTENTdm administrator and that you are using the CONTENTdm administrator account that is installed on the machine. This may be the initial account installed on the CONTENTdm Server. You can use another account to perform the procedures in this tutorial, but if you do, you must be able to add users. For more information, see the administration guide for your platform within the **CONTENTdm User Support Center**.

If you are assigning user accounts within a Windows operating system, you must have local administrative rights on the local server. All users that access the CONTENTdm Administration pages must have execute permissions on the *cgi-bin/admin* directory.

To perform the procedures within this tutorial, you must know how to add users to the Windows operating system. Or, you may use existing users. In addition, you may need to know how to add users to a group. Adding users to the Windows operating system or to a group is not covered in this tutorial.

If you are assigning user accounts within a Linux environment, the users that you assign user rights to must already have Apache accounts. To perform the procedures within this tutorial, you must know how to add accounts in the Apache Web server. Or, you may use existing accounts. Adding users to Apache will not be covered in this tutorial.

Section II Learning About User Rights

CONTENTdm provides a number of different user rights that give special permissions when using CONTENTdm. The rights can be assigned separately or in combination with other rights. One or more user rights in combination sometimes provides additional functionality.

The matrix provides you with the functionality for each user right in CONTENTdm Administration. The bold face indicates how the rights are described in the user interface.

User Right	What It Allows:
Server Rights	
Add collections. Users must have local administrator rights to use this right.	Users can add collections.
Delete collections	Users can delete collections.
Administer user rights	Users can add, delete and assign rights to user accounts.
Setup Global Website	Users can access the Website Configuration Tool and configure CONTENTdm Website at a global level and for all collections. Note: Users who will configure specific collections do not need permission at the global level.
Collection Rights	
Approve items and build index	Users can approve items in the pending queue and build the collection index. This allows an item to be added to a collection.
Edit metadata	Users can find and replace metadata. Users can edit metadata using the Project Client (changes are effective once the collection is re-indexed) but cannot delete items from the collection.
Edit metadata, approve items and build index	Users can edit metadata in both the Project Client and the Web interface, but cannot delete items from the collection. Users can approve items in the pending queue and index collections. Users can find and replace metadata (effective once a collection is re-indexed).
Edit metadata, approve items and build index, delete and	Users can edit metadata in both the Project Client and the Web interface and delete items from the collection. Users can find and replace metadata. (The changes are effective

User Right	What It Allows:
unlock items	once the collection is re-indexed.) Users can unlock items that have been frozen from previous editing.
Select access rights with either edit metadata or configure settings and field properties	Users can specify access rights for items in the Web interface when combined with either the right to edit metadata and/or the right to configure settings and field properties. Users can specify access rights when adding items using the Project Client.
Delete and unlock items, edit metadata	Users can delete items and edit metadata. (The changes are effective once the collection is re-indexed.) Users can unlock items that are locked because they have been edited or deleted. Users can find and replace metadata.
Set collection profile settings and field properties	Users can change settings and field properties within a collection. This includes adding a new field, enabling and administering controlled vocabulary, enabling full text searching, and defining full resolution settings.
Run reports and export metadata	Allows user to run reports and export data into a text file or a Microsoft® Excel file.
Setup collection Website	<p>Users can access the Website Configuration Tool and configure CONTENTdm Website for the selected collection(s).</p> <p>Note: Website rights for specific collections allows users to configure only at the collection level for the selected collections</p>

Table 1. User Rights

Section III A Scenario

The types and number of CONTENTdm users that your organization has depends on your organization’s structure and size. How your network is set up also may affect the number of user accounts in your organization.

A scenario for a medium-sized organization may be:

- **System administrator.** Has all server rights and all rights on all collections. This person manages user accounts for all users working within CONTENTdm. This includes adding and deleting users and assigning user rights. This user may also add and delete collections. The system administrator most likely does not perform any day-to-day work within CONTENTdm, such as cataloging or collection configuration.
- **Collection administrator.** Has rights to add and delete collections and all rights for all collections. Does not have rights to manage users. Has rights to set up the website using the Website Configuration Tool (globally or per collection). This person might be the project manager, digital librarian or other person leading the digital collection projects. Involved with creating and configuring collections. The collection administrator may not perform any day-to-day work within CONTENTdm, such as cataloging.
- **Cataloging librarian.** Does not have server rights but has rights to all collections. Works with the collections daily, performing tasks such as approving items and

determining whether the item is available to all users or restricted to certain users, and determining terms within a controlled vocabulary.

- **Staff member.** Does not have server rights and has limited collection rights. Has rights to edit items and add items in a particular collection.

In this tutorial, we will use the existing Administrator account to add six users to CONTENTdm Administration. Your organization may have more or fewer administrative accounts than those listed here, but these accounts show examples of the type of users.

Administrator—System administrator. This account is the account that we will use to add the other users. This account is set up when the software is installed. Has all server and all user rights for all collections. This is the account that has local administrator privileges on the server.

Isaac—Staff member. Has rights to add items through the Project Client and the Web interface. Can also edit metadata for a single collection.

Jeanine—Cataloging librarian. Has rights to approve items and build indexes, edit metadata, assign access rights to items, delete and unlock items, set collection profile settings and field properties and run reports and export metadata for all collections.

Sarah—Collection administrator. Has rights to add and delete collections and add users for all collections. Has collection rights for all collections. Has rights to set up the website at a global level and for each collection.

Theodore—Staff member. Has rights to add items through the Project Client and the Web interface. Can also edit metadata for a single collection. Has rights to set up the website for a specific collection.

Xenia—Staff member. Has rights to add items through the Project Client and the Web interface. Can also edit metadata for a single collection. Has rights to set up the website for a specific collection.

The two collections that we will assign rights to in this example are the OCLC Sample Collection and the My First Collection. We can assign rights to specific collections or assign rights to all collections, including collections created in the future.

Section IV Adding New Users

In this section, we will add the user accounts and rights listed in Section 3.

Users who only use CONTENTdm to add items to the pending queue of collections via the Project Client and/or the Add page do not need a CONTENTdm user account. As long as these users have accounts on the operating system (Windows) or Linux, they will be able to connect to the CONTENTdm Server to upload items. Likewise, they will be able to navigate to the Add page on the CONTENTdm Server at

<http://CdmServer.com:port/cdm4/admin/items/add.php>.

Some system administrators may choose to add all users, even those who do not need CONTENTdm accounts to better track them. In this case, the user must be given collection rights when first added as you cannot add a user without collection rights. However, after the user is added, you can then edit the user to have no rights.

Note: If you are using CONTENTdm on a Windows platform, you can add new accounts to the CONTENTdm Administrators group. See **Using the CONTENTdm Administrators Group** at in the CONTENTdm Help Files.

To add a new user to CONTENTdm, you must know the user name used on the operating system for Windows users or within Apache for Linux users. User names are case-sensitive. In Windows, users are added to the CONTENTdm Server using the Computer Management utility

within Administrative tools. In Apache, after logging in with administrator user name and password, use the `htpasswd usersfile username` command.

Refer to the documentation for your operating system (Windows) or Web server (Linux) for more information. After you know the user accounts exist, you are ready to add users to CONTENTdm.

Note: For more information about managing users of the Hosted version of CONTENTdm, see the Administration Guide for Hosted Instances (version 6) available on the **User Support Center**.

To add new users:

1. Open CONTENTdm Administration by either using the link to CONTENTdm Administration in the Project Client (you must have a project open) or by navigating directly to CONTENTdm Administration at **http://CdmServer.com:port/cgi-bin/admin/start.exe**. (Hosted users can refer to the server URL supplied in your welcome e-mail or consult your primary CONTENTdm contact person.)
2. Log in with the user name and password used when installing the server.
3. Select the **Server** tab.
4. Click **Users**.
5. Click **Add User**.
6. Enter an existing user name. Refer to the table below and enter a user name to follow the example.
7. Select the rights that you wish to assign to the user. Refer to the table below and enter the rights for the user.
8. Select **All collections, including collections added in the future** for those people with All in the Select Collection column in the table. Or, select Specify collections and, using the arrows, move the selected collection into the right box.
9. Click **Add**.

You will see a view of the user and the rights assigned to the user. Once you confirm that you have added the correct user rights, add the next CONTENTdm user listed in the table below.

User Name	Role	User Rights	Select Collection
Isaac	Staff member	Edit metadata	OCLC Sample Collection
Jeanine	Cataloging librarian	Approve items and build indexes Edit metadata Set access rights Delete and unlock items Set collection profile and field properties Run reports and export metadata	All
Sarah	Collection administrator	Add collections Delete collections Administer user rights Approve items and build indexes Edit metadata	All

User Name	Role	User Rights	Select Collection
		Select access rights Delete and unlock items Set collection profile and field properties Run reports and export metadata Setup global website	
Theodore	Staff member	Edit metadata Setup collection website	OCLC Sample Collection
Xenia	Staff member	Edit metadata Setup collection website	My First Collection

Table 2. Users and Their Rights

Unable to Add User to Administrator Group

If you are using a Windows server, you may encounter what seems to be an error when adding new users. When a new CONTENTdm user is created on a Windows platform, the system attempts to add the user to a group on the operating system called CONTENTdm Administrators. If, for any reason, the system is unable to add the user to the group, a message is displayed. This may be because the CONTENTdm Administrator group does not exist or it may be because your network is set up to prevent users from being automatically added to the Administrators group. It may also be that the CONTENTdm Administrators group does not have full rights to the */cgi-bin/admin* directory.

If you are sure that you have a CONTENTdm Administrator account that has full rights to the */cgi-bin/admin* directory, you must manually add the new account to the CONTENTdm Administrator group. Do this by using the Computer Management utility within Administrative tools.

Section V Managing Users

As staff resources within your organization change, you will inevitably need to delete users and change user rights. In our scenario, Jeanine, the cataloging librarian, leaves the organization, so we must delete her account. We then will give additional user rights to two staff members until a new cataloging librarian is hired. Xenia will take over Jeanine's user rights for the My First Collection until a new cataloging librarian is hired. Theodore, will temporarily take over Jeanine's user rights for the OCLC Sample Collection. Another staff member, Isaac, transfers to another position where he no longer needs user rights within CONTENTdm administration. We will remove all user rights on his account.

Viewing User Rights

A good practice is to review user rights before making any changes to a user account. In the example below, we will confirm what rights that Jeanine has.

To view rights:

1. Open CONTENTdm Administration and select the **Server** tab.
2. Click **Users**. A list of all users with CONTENTdm rights is shown.

Users
Add, view, edit, and delete users. Assign administrative rights.

Users	add user
Administrator	view edit delete
Isaac	view edit delete
Jeanine	view edit delete
Sarah	view edit delete
Seanna	view edit delete
Theodore	view edit delete
Wania	view edit delete

Users add user

Figure 1. View User Accounts

3. Click **View** next to the user whose rights you wish to review.

View settings for: Jeanine

Server rights	edit delete
None	
Collection rights	
Collections	Rights
All collections	Approve items, build indexes Edit metadata Set access rights Delete items Configure settings/field properties Run reports/export records

Figure 2. View Rights for Individual User

4. View the user's rights. Jeanine is able to approve items, build indexes, edit metadata, set access rights, delete items, configure settings/field properties and run reports/export records for all collections. If she had special permissions for different collections, they would be listed separately.

Deleting Users

Now that we know what rights Jeanine has, we can delete her CONTENTdm administrative account. When we use the delete function within user rights, we are just deleting CONTENTdm Administrative User rights, not the account that is on the server. We would need to enlist the help of a server administrator to delete the account from the server.

If we are already viewing the user's account, as we did in the last section, we just click **Delete**.

The Delete function is also accessible on the page that lists all users.

Once you have deleted the user, the user list refreshes without the name of the deleted user.

Editing User Rights

When you edit a user's rights, you are replacing existing user rights with your new selections. Check the existing rights before editing user rights. There are two ways to view the collection rights within the editing page. If we only select one collection, we can see the existing rights for the user in the editing window. The rights are indicated by checkmarks. Or, scroll down the window to see the table that lists user rights for all collections.

Now, we will edit Xenia's account to give her new user rights.

We will add more user rights for a specific collection for Xenia's account.

To edit user rights:

1. Open CONTENTdm Administration and select the **Server** tab.
2. Click **Users**. A list of all users with CONTENTdm rights is shown.
3. Click **Edit** next to the user whose rights you wish to edit. In this case, it is Xenia.
4. Select the collection that you are editing. For this example, we will select My First Collection. Xenia's current user rights are indicated by checkmarks.

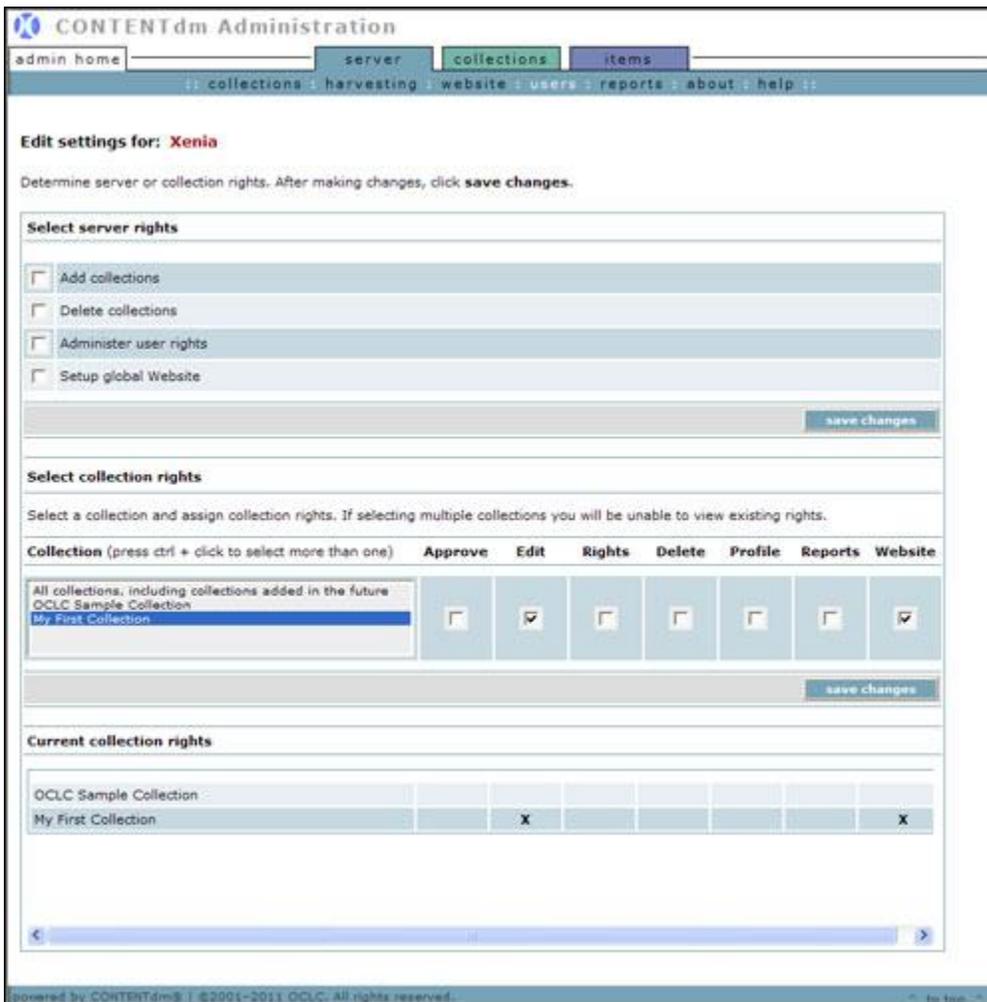


Figure 3. Edit User Rights When Editing

5. Select the collection rights that you wish Xenia to have. The rights are indicated by one word. For this example, select Approve, Rights, Delete, Profile, and Reports. (Edit and Website are already selected.)
6. Click **Save changes**. The view settings page displays with the new user rights.



Figure 4. View Xenia's Rights

In the example above, we see that Xenia now has full collection rights for the My First Collection while she has no rights for the OCLC Sample Collection.

Removing Collection Administration Rights

Now, we will remove user rights for Isaac. We will not delete his account: we will just remove his user rights. He will still be able to add to the collection using the Project Client or the Add page. This will allow us to easily add other user rights if he needs them again.

Removing collection rights is very similar to editing collection rights. Follow the same instructions for editing user rights. Select **All Collections**. Then, do not select any collection rights. Click **Save changes**. You will be asked to confirm whether you want to remove all rights for all collections. Click **OK**.

Isaac's settings now show that he has no server or collection rights.



Figure 5. View Isaac's Rights

Section VI Removing Administer User Rights

In order to prevent a scenario where no one can manage users, there must always be one user who can administer user rights. Therefore, the administrator who is currently logged in is unable to remove administer user rights from their own account. In this scenario, we have the

right to change user rights for everyone. However, if we try to remove the user rights for the profile that we are using (Administrator), we will be unable to remove the right to administer user rights. We would have to ask another person with that right to remove that right from our profile because there must always be one user with the right to administer user rights.

Summary

Now that you've gone through this tutorial, you know that any time staff within the organization changes, you can easily change user rights at any time. You can add and delete users and manage user rights as needed for your organization.