

Users Guide Table of Contents

Users Guide Main Page	3
Users Guide Description	3
Staff & Public Users	3-17
Adding a Staff User	3-16
Login Information	3
Personal Information	4
User Access Privileges	4-10
Section Access	4
No Section Access	5
Full Site Section Access	5
Limited Section Access	5-10
Assigning Specific Section Access	5-6
Selecting & Searching Sections	6
Searching for Sections	6-7
Legend	7-10
Include Subsections	7
Individual Sections	8-10
Admin Privileges	10-16
Content Privileges	13-16

Extra Privileges	16-20
Adding a Public User	19-20
Finding a User	21
Editing Users	21-22
Deleting Users	22-27
Reassigning Articles	24
Deleting Articles	24-25
Reassigning Dependent Authors	25-26
Reset Password	26-27

Users Guide

Select **Admin, Users** from the SOCS Toolbar.

Staff and Public

There are two types of Users within SOCS. Staff Users have access to publish content. Public Users are people who have signed up to receive Calendar Event reminders, for Parent Teacher Conferences or have access to Private Sections.

Add Staff User

Login Information

- To add a user, select **Add User**, enter the person's Email address, and select Staff User.

Add User ×

Email address

New user's email address.

Staff User Public User

- Enter the Email address again for verification.

NOTE: The email address provided will receive an email with instructions on how to complete user registration.

Sign In Information

Email Address *(required)*

name@example.com

Confirm Email Address *(required)*

Personal Information

Note: Personal Information added will display on Staff Pages.

- **First Name** and **Last Name** are required.

Personal Information

First Name <small>(required)</small>	Last Name <small>(required)</small>
<input type="text"/>	<input type="text"/>
Title	Organization
<input type="text"/>	<input type="text"/>
<input type="button" value="Add Address"/>	
Address, city, state, postal code, country, phone	
<input type="button" value="Add Bio Description & Image"/>	
Short personal description and photo of the user	

User Privileges

There are two types of Users within SOCS:

- **Staff Users** have access to publish content.
- **Public Users** are people who have signed up to receive Calendar Event reminders, for Parent Teacher Conferences or are members of a Private Section.

Note: If Staff User is not selected, the user will not have access to add content.

Staff/Public Access ^

Staff User Public User

Section Access

Select the Sections you want the user to be able to add content to.

Section Access

- None:** User doesn't have access to any section on the site
- Full Site:** User has access to all sections on the site
- Limited:** User has access to the following selected sections on the site

- **None**

- o Select None if the user you are adding:

- will be creating articles, but will not have the ability to post (approve) articles to your SOCS site.
 - will not have access to other sections than their Staff/Blog Page.
 - will not create articles but will have access to other options such as: Video, Notifier, Staff Page Templates, Slideshow, Traffic Report, Clear Site Cache, Bios or Surveys.

- **Full Site**

- o By selecting Full Site, this user will have access to post/approve article content in all sections within the SOCS Site.

- **Limited**

- o By selecting Limited, you will be able to select the sections you wish the user to post/approve content to.

● **Limited:** User has access to the following selected sections on the site

Manage Assigned Sections

Assigned Sections

Include Subsections	Remove	Section Name (Section Second-level Section>>Third-level Section)
No sections have been assigned to this user.		

Select **Manage Assigned Sections** to assign sections.

- All first level Sections will appear with sub-sections collapsed.

Name: SOCS Support, **Email:** test@email.com

Select the sections in which this user will be allowed to post (approve) content.

The  exclamation mark icon indicates that a section has some sub-sections assigned to this user.

To **include subsections** access, check the box with the green background color.


To view sub-sections, expand by tapping the  plus or  exclamation mark icons. Collapse by tapping the  minus icon. You can also use the Expand All/Collapse All/Show Assigned Sections buttons.

Search for a section

Found: **0** ...by entering a section name here


Sections matching the text entered will be **highlighted**

Expand All Collapse All Show Assigned Sections

 Administration
 Alternative Center

Selecting and Searching Sections


To view the sub-sections, expand the first level by selecting the + next to the section.

 Administration

To view all sections and sub-sections, select **Expand All** button.

Expand All Collapse All Show Assigned Sections

Collapse the sub-sections by selecting the - next to the section.

 Administration

To view only first level sections, select the **Collapse All** button.

Expand All Collapse All Show Assigned Sections

Search for Sections

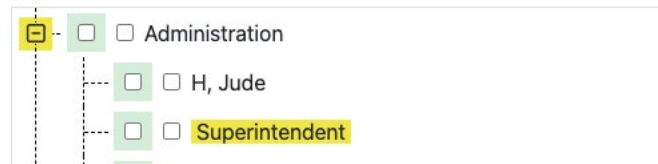
A filtering feature will display the sections in yellow matching the letters/words that are entered into the text box to the right of the magnifying glass (search) icon.

The text entered can be located anywhere within a section name and is NOT case sensitive. While filtering, a **Working...** message will be displayed along the right side of the text box and will disappear once the filtering is complete. The filtering process can take a couple seconds if you have many sections, but will take a fraction of a second for sites with fewer sections. The processing power of your machine and browser will also affect the speed of the filtering process.

Search for a section

Found: **1** Super

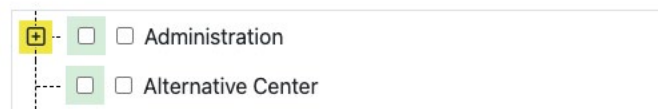
Sections matching the text entered will be **highlighted**



Search for a section

Found: **1** Super

Sections matching the text entered will be **highlighted**



Legend


Include Subsections

- To select the first level section and all sub-sections, select the box next to the first level section with the green background.
- To select the second level section and all sub-sections, select the box next to the second level section with the green background.

Individual Sections

Note: If you are not selecting all sub-sections, select second box next to the section (without a background color).

Select the sections in which this user will be allowed to post (approve) content.

The  exclamation mark icon indicates that a section has some sub-sections assigned to this user.

To **include subsections** access, check the box with the green background color.

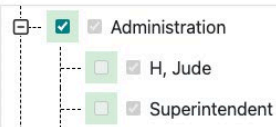
To view sub-sections, expand by tapping the  plus or  exclamation mark icons. Collapse by tapping the  minus icon. You can also use the Expand All/Collapse All/Show Assigned Sections buttons.

Search for a section

Found: **0** ...by entering a section name here

Sections matching the text entered will be **highlighted**

Expand All Collapse All Show Assigned Sections



Some Subsections Assigned: When the sections are collapsed, you will see an explanation mark next to the section if sub-sections have been assigned.

Name: socs support, **Email:** test@email.com

Select the sections in which this user will be allowed to post (approve) content.

The  exclamation mark icon indicates that a section has some sub-sections assigned to this user.

To **include subsections** access, check the box with the green background color.

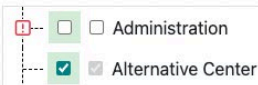
To view sub-sections, expand by tapping the  plus or  exclamation mark icons. Collapse by tapping the  minus icon. You can also use the Expand All/Collapse All/Show Assigned Sections buttons.

Search for a section

Found: **0** ...by entering a section name here

Sections matching the text entered will be **highlighted**

Expand All Collapse All Show Assigned Sections



Show Assigned Sections: This option will expand all sections with selected sections.

Name: socs support, **Email:** test@email.com

Select the sections in which this user will be allowed to post (approve) content.

The  exclamation mark icon indicates that a section has some sub-sections assigned to this user.

To **include subsections** access, check the box with the green background color.

To view sub-sections, expand by tapping the  plus or  exclamation mark icons. Collapse by tapping the  minus icon. You can also use the Expand All/Collapse All/Show Assigned Sections buttons.

Search for a section

Found: **0** ...by entering a section name here

Sections matching the text entered will be **highlighted**

Expand All Collapse All Show Assigned Sections

- Administration
 - H, Jude
 - Superintendent
 - Support, Dr. SOCS
 - support, socs
 - Testing1
- Alternative Center

Select **Save** when you have finished selecting the sections this user will have access to. You will be brought back to the Section Access area.

The Assigned sections will display to provide you a quick glance of the sections this user has access to.

Section Access

- None:** User doesn't have access to any section on the site ⓘ
- Full Site:** User has access to all sections on the site
- Limited:** User has access to the following selected sections on the site

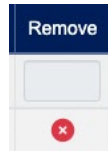
Manage Assigned Sections

Assigned Sections

Clear Filter

Include Subsections	Remove	Section Name (Section Second-level Section>>Third-level Section)
All		Search...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administration H, Jude
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administration Superintendent
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Alternative Center

You have the option to remove access to a section by selecting the Remove button.

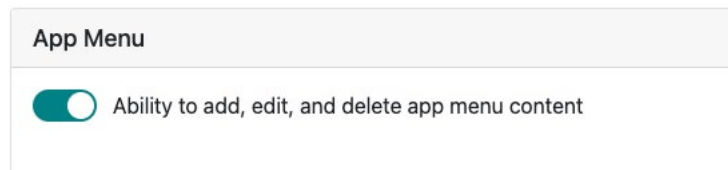


To add access to additional sections or to include Subsections, select Manage Assigned Sections.

Admin Privileges

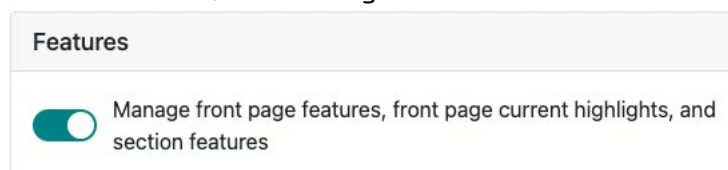
App Menu (App in Stores Feature)

- Modify your organization's app home screen for the App in Stores Feature (if applicable).



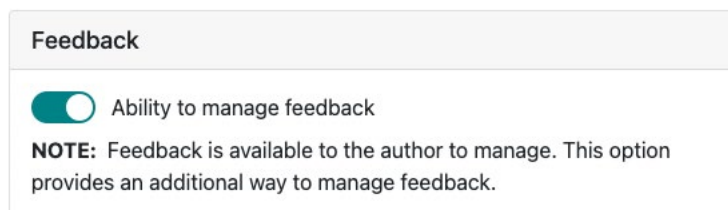
Features

- Access to choose the Front/Home Page content.



Feedback

- Ability to approve/edit/remove feedback posts for all articles.



Images

- Can manage images for the site.

Images
<input checked="" type="checkbox"/> Ability to add, edit, and delete images
NOTE: Images include mastheads, image rotator, and section images provided your theme contains those types of images.

Notifier

- Can create messages (220 characters long) to send via multiple listservs and text.

Notifier
<input checked="" type="checkbox"/> Ability to create, send, and manage messages

Parent Teacher Conference

- Add a Parent/Teacher conference to the site.

Parent Teacher Conferences (PTC)
<input checked="" type="checkbox"/> Ability to add, edit, and delete parent teacher conferences
<input checked="" type="checkbox"/> Allows teachers assigned to a conference the ability to manage their schedules

Private Sections

- Select sections and calendars as private.
- View gives access to view information in private sections or calendars.

Private Sections

Manage private sections View and/or edit private sections (with author rights)

Restrict private section access ⓘ

Private Sections

Showing all 10

Filter

>>	>
Blaine - Test Section #1	
Blaine - Test Section #2	
Blaine - Test Section #3 With An Incredibly Long Name Because You Know	
Blaine - Test Section #4	
Blaine - Test Section #5	

Access to View

Empty list

Filter

<	<<
---	----

Restrict private calendar access ⓘ

Private Calendars

Filter

>>	>
Blaine - Test Calendar #1	
Blaine - Test Calendar #2	

Access to View

<	<<
---	----

Sections

- Create the navigation structure for the site. The user will only have access to manage the sections to which they have been assigned under Section Access.

Sections

Ability to add, edit, and delete sections

Staff Pages Templates

- Manage Staff Page Article Templates.

Staff Page Templates

Ability to add, edit, and delete the pre-loaded staff article templates

NOTE: SOCS has provided pre-loaded staff article templates for you to modify. This option does NOT provide the ability to add Staff Pages as an author.

Users

- Select this box to give access to adding new users.

Users	
<input checked="" type="checkbox"/>	Ability to add, edit, and delete users

Theme Options

- Make specific design changes on their SOCS site.

Theme Options	
<input checked="" type="checkbox"/>	Ability to edit theme options

Content Privileges

Article Access

In the Article Access section you can decide what level of adding and editing content you wish to provide the user.

Articles

Ability to create articles

Can edit **any article** in assigned sections

Staff Pages

Create Staff Pages **Under** This Section

Select Parent Section ▼

Staff Page Section Name

Staff Blog

News Update Access

Limit article approval ?

- **Ability to create articles:** Check this box to allow users to create article content and post content based on the Section Access selected.
- **Can edit any article in assigned sections:** By default users are only able to edit articles they have created. Check this box in order for the user to edit all articles within the full site or the sections selected.
- **Staff Pages:** Can create staff pages within the section selected (under this section).
 - Note: If the user will have staff pages only, select None as the option in the Section Access. The Staff Page section will be automatically generated and use all information added to the Personal Information area. After the user has been added, the users Section Access will change from None to Limited and their Staff/Blog section will be listed.
- **Section Name:** The user's name will pre-fill this text box with the format of Last Name, First Name. However, you can edit the section name. Example: the name pre-fills to "Smith, John" but it can be edited to say "John Smith's Technology Department". This field will determine the user's Staff Page section name that is displayed on your website.

- **Staff Blog:** Can create blog pages within the section selected (under Staff Pages).
- **News Update Access:** can create and send News Updates.
- **Limited article approval:** By selecting this box, you may select an author(s) who can approve articles for the user you are adding.

Select **Limited article approval** if:

- The user hasn't been assigned any sections and all of their articles will require approval.
- The user has assigned sections, but will require approval for articles published outside of those sections.
- If the **box is unchecked**, the user is not limited to a select few authors for article approval or reassignment, but can choose from all available authors.

Limit article approval to the following: ⓘ

Available Authors	Selected Authors
Showing all 16	Empty list
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Filter</div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> >> > </div> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Socs, Joey Steiner, David Support, Dr SOCS Weakly, Meg Weakly, Rachelle </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Filter</div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> < << </div> <div style="border: 1px solid #ccc; min-height: 100px;"></div>

Calendars

- Can add/modify/delete calendar information.

Calendar	
<input checked="" type="checkbox"/>	Ability to add, edit, and delete calendars, categories, and events

Slideshows

- Can create slideshow presentations.

Slideshow	
<input checked="" type="checkbox"/>	Ability to add, edit, and delete slideshows

Extra Privileges

Adserver: Banners

- Can create and position banners.

Adserver Banners	
<input checked="" type="checkbox"/>	Ability to add, edit, and delete adserver banners

Bios

- Staff Biographical Information.

Bios	
<input checked="" type="checkbox"/>	Ability to add and edit author biographies

Buttons / Quick Links

- Can create and position buttons.

Buttons / Quick Links
<input checked="" type="checkbox"/> Ability to add, edit, and delete buttons / quick links

Clear Site Cache

- Refreshing your site.

Clear Site Cache
<input checked="" type="checkbox"/> Ability to clear the site's cache

Contact Us

- Provide contact information in one central location on your site.

Contact Us
<input checked="" type="checkbox"/> Ability to add, edit, and delete contact us information

HTML Banners

- Leaderboard, Top, Bottom, and Right Banner Spots.

HTML Banners
<input checked="" type="checkbox"/> Ability to add, edit, and delete HTML banners

Polls

- Add Polls for the site.

Polls
<input checked="" type="checkbox"/> Ability to add, edit, and delete polls

Spotlights

- Add Spotlights to the site.

Spotlights
<input checked="" type="checkbox"/> Ability to add, edit, and delete spotlights

Staff Directory

- Create one or more directories for to share your staffs' contact information with users.

Staff Directory
<input checked="" type="checkbox"/> Ability to add, edit, and delete staff directory information

Survey

- Can create and post surveys.

Survey
<input checked="" type="checkbox"/> Ability to add, edit, and delete surveys

Traffic Report

- Has access to the Traffic Report Information.

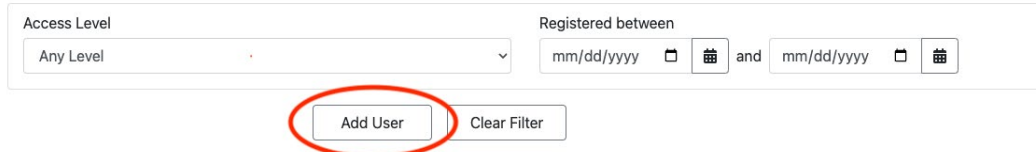
Traffic Reports
<input checked="" type="checkbox"/> Ability to view site statistics

Select **Save** to add user to the system.

Add Public User

Login Information

- To add a user, select Add User

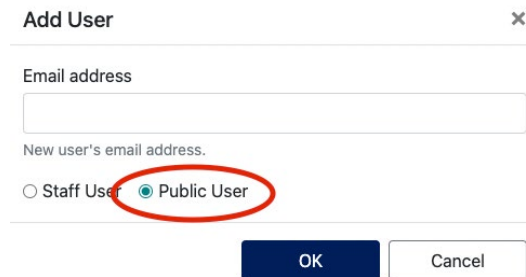


Access Level: Any Level

Registered between: mm/dd/yyyy and mm/dd/yyyy

Add User Clear Filter

- Enter the Email address and select Public User



Add User ✕

Email address

New user's email address.

Staff User **Public User**

OK Cancel

- Enter the Email address again for verification.

NOTE: The email address provided will receive an email with instructions on how to complete user registration.

Sign In Information

Email Address (required)

Confirm Email Address (required)

Personal Information

- **First Name** and **Last Name** are required.

Personal Information

First Name <small>(required)</small>	Last Name <small>(required)</small>
<input type="text"/>	<input type="text"/>
Title	Organization
<input type="text"/>	<input type="text"/>
<input type="button" value="Add Address"/>	
Address, city, state, postal code, country, phone	
<input type="button" value="Add Bio Description & Image"/>	
Short personal description and photo of the user	

User Privileges

- Public Users will not need Staff Access.
- Select the View and/or Edit Private Sections.
 - If the user will not have access to all Private Sections/Calendars, select the **Restrict Private Section Access** box and move the section the user will have rights to view into the **Access to View** area.

Private Sections

Manage private sections
 View and/or edit private sections (with author rights)

Restrict private section access ⓘ

Private Sections <div style="border: 1px solid #ccc; height: 40px; display: flex; justify-content: space-between; align-items: center; padding: 2px;"> >> > </div>	Access to View <div style="border: 1px solid #ccc; height: 40px; display: flex; justify-content: space-between; align-items: center; padding: 2px;"> < << </div>
---	---

Restrict private calendar access ⓘ

Private Calendars <div style="border: 1px solid #ccc; height: 40px; display: flex; justify-content: space-between; align-items: center; padding: 2px;"> >> > </div>	Access to View <div style="border: 1px solid #ccc; height: 40px; display: flex; justify-content: space-between; align-items: center; padding: 2px;"> < << </div>
--	---

Find User

To find a staff member:

- Use the filter above the staff listing to search for users.
 - **Group** allows you to filter between Staff and Public.
 - **Access** allows you to filter between Full, Limited, and None access.

Filtered: 21 Total: 30 Q Contains Section Access: F = Full Site, L = Limited, (Blank) = None

Edit	Group	Access	Username	Last Name	First Name	Email Address	Registered
	Staff	All	Search...				
	Staff	L	itest	Appleseed	Johny	iostest@fes.org	11/13/2017
	Staff	F	scarlson	Carlson	Stephen	stcarlson@esu1.org	04/10/2014

Note: Leave all fields blank to see a full list of users

To find a public member:

- Use the Group dropdown to switch from Staff to Public.

Note: Leave all fields blank to see a full list of users

Edit Users

To find a staff member:

- Enter either the name or e-mail address of the user into the filter
- **Access Level** is an optional field and can be left as All.

Filtered: 6 Total: 40 Search: Contains Section Access: F = Full Site, L = Limited, (Blank) = None

Edit	Group	Access	Username	Last Name	First Name	Email Address	Registered
	Staff	All	Search...	H			
	Staff		lbushnell	Bushnell	Linda	lindabu@fes.org	03/10/2016
	Staff	L	jh	H	Jude	judeh@email.com	11/04/2021
	Staff	F	theiser	Heiser	Tami	theiser@esu1.org	09/23/2013
	Staff	F	mnichols	Nichols	Mark	markn@fes.org	02/07/2018
	Staff	L	vpasho	Pasho	Vincent	vincentp@fes.org	04/03/2013
	Staff	L	vpasho3	Pasho	Vinnie	test@fes.org	08/03/2015

Note: Leave all fields blank to see a full list of Users

Select the edit icon by the user you wish to update.

- Make the changes and select **Update User**.

Delete Users

To find a staff member:

- Enter either the name or e-mail address of the user into the filter
- **Access Level** is an optional field and can be left as All.

Filtered: 2 Total: 40 Search: Contains Section Access: F = Full Site, L = Limited, (Blank) = None

Edit	Group	Access	Username	Last Name	First Name	Email Address	Registered
	Staff	All	Search...			sd	
	Staff	F	scarlson	Carlson	Stephen	stcarlson@esu1.org	04/10/2014
	Staff	F	ssupport22	Support	Dr SOCS	socssupport@fes.org	04/29/2006

Note: Leave all fields blank and select Search to see a full list of Users

- Select the edit icon by the user you wish to update.
- Select **Delete User** at the top of the page.



Before a User can be deleted, you may need to:

- Reassign Articles,
- Assign Dependent Authors to a new Author
- or Select a new Calendar Manager

Once selecting **Delete User** you can receive the following messages.

Until the following issue is addressed, the user cannot be deleted:

- **Articles:** User is the author of one or more articles

Reassign Articles

Note: If the user does not have articles, authors assigned to them, or is not a calendar manager the user will be deleted.

Select the **Reassign Articles** button.

Note: If the user only has articles, the button will read Reassign Articles. If the user only has assigned authors, the button will read Reassign Authors.

Reassign/Delete Articles

To reassign: choose an author, select articles, and click the **Reassign** button.

Authors:

1 article owned by Meg Weakly Clear Filter

Select	Headline	Section
<input type="checkbox"/>	Meg	

To Reassign Articles

- Select an Author in the **Assign article to** field.
- Select all articles by checking the box directly below the word **Reassign**, or individually check only those you wish to assign to the author you selected.

Note: For individually reassigning articles, repeat the process until all articles have been reassigned.

- Select **Reassign Articles**

Note: An email will be sent to the Author you selected notifying them they have been assigned additional limited authors as a result of a user being removed from the system.

To Delete Articles

- Select all articles by checking the box directly below the word **Delete**, or individually check only those you wish to delete.
- Select **Delete Articles**

You will receive a message stating your articles have been reassigned or deleted.

Select **Done** to return to the **User** screen or select **Reassign Dependent Authors**

Reassign/Delete Articles
 To reassign: choose an author, select articles, and click the **Reassign** button.

Authors:

1 article owned by Meg Weakly Clear Filter

Select	Headline	Section
<input type="checkbox"/>	Search...	
<input checked="" type="checkbox"/>	Meg	

To Reassign Dependent Authors

Reassign/Delete Articles
 To reassign: choose an author, select articles, and click the **Reassign** button.

Authors:

1 article owned by Meg Weakly Clear Filter

Select	Headline	Section
<input type="checkbox"/>	Search...	
<input checked="" type="checkbox"/>	Meg	

- Select an Author in the **Assign dependent authors to** field.
- Select all authors by checking the box directly below the word **Reassign**, or individually check only those you wish to assign to the author you selected.

Note: For individually reassigning authors, repeat the process until all authors have been reassigned.

- Select **Reassign Authors**
 You will receive a message stating your articles have been reassigned or deleted.

Note: An email will be sent to the Author you selected notifying them they have been assigned additional authors as a result of a user being removed from the system.

- Select **Done** to return to the User screen or select **Authors**

Reset Passwords

To find a staff member:

- Enter either the name or e-mail address of the user into the filter
- **Access Level** is an optional field and can be left as All.

Filtered: 6 Total: 40 Search: Contains Section Access: F = Full Site, L = Limited, (Blank) = None

Edit	Group	Access	Username	Last Name	First Name	Email Address	Registered
	Staff	All	Search...	H			
	Staff		lbushnell	Bushnell	Linda	lindabu@fes.org	03/10/2016
	Staff	L	jh	H	Jude	judeh@email.com	11/04/2021
	Staff	F	theiser	Heiser	Tami	theiser@esu1.org	09/23/2013
	Staff	F	mnichols	Nichols	Mark	markn@fes.org	02/07/2018
	Staff	L	vpasho	Pasho	Vincent	vincentp@fes.org	04/03/2013
	Staff	L	vpasho3	Pasho	Vinnie	test@fes.org	08/03/2015

Note: Leave all fields blank to see a full list of Users

Select the edit icon by the user you wish to update.

- Select **Reset Password**



You will receive the following window to confirm the password reset.

Reset Password



Click OK to send an email to **judeh@email.com** with instructions on how to reset their password.

OK

Cancel

The user will receive an email with instructions to create their new password.