CMS 2.0: Roles & Permissions

REACH Media Network

ROLES OVERVIEW

With CMS 2.0, REACH has added the ability to assign roles to users to streamline workflows and help clients better manage tasks. These roles can add or restrict certain apps or functionality for users based on pre-determined permissions. There are 2 default roles REACH offers that you should familiarize yourself with before adding your own roles.

The first is "Full Access." This is essentially a default role that allows you to give access to the admin panel while restricting other apps. For instance, maybe you want a new user to only have the ability create/edit users, access the dashboard, and manage players. As you can see from the picture below, you can grant these permissions by clicking the toggle for each application.

When editing a role, you will first edit the "Scheme" of that role. The scheme determines what apps within this role users will have access to. On the "Users" tab, you will be able view and search users under that role, as well as add new ones!


Lastly, there is the "Owner" role. This role cannot be deleted, as every organization needs an owner to manage it. Owners have unrestricted access to your entire CMS. If you add another user to be an owner, they too will have unrestricted access to everything, so please keep that in mind.

FACILITY ROLES

Just like users, facilities also have roles that they can be assigned to help streamline workflows. To access facility roles, click the facility dropdown menu at the top of your page and select the desired facility. You will then have access to two default roles for facilities.
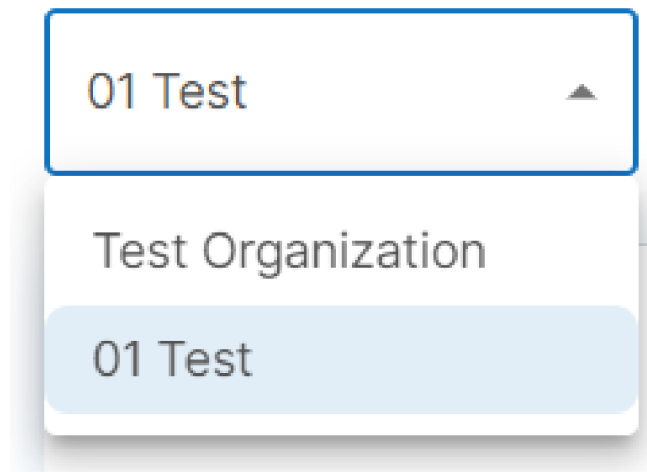
The two default roles for facilities are "Content Creator" and "Admin." When assigned as a content creator, that user will receive access to the dashboard, media library, and playlist by default. Content creators are usually those who are creating the assets or adding the content to the screens, so that's all we wanted this role to be concerned with. Of course, you can add and subtract permissions as needed.

The "Admin" role is like the "power user" for that entire facility. These users will have access to the entire suite of apps that facility has access to. Similar to the content creator role, this role can still be limited by adding or taking away permissions.

When assigning roles, you can edit permissions further by going into the settings for each tool or application. This can be accessed by clicking the gear icon to the right of each app. If you see the gear icon greyed out, that means extra settings are not available for that app!
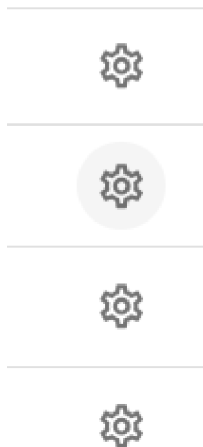
Once you click the gear icon, you will open up a modal that will allow you to write specific rules for apps on a granular level. Take the playlist for example. Say you wanted to give a user access to the playlist app, but you didn't want them to have access to every playlist. Or maybe for some of them, they can only view those playlists. You can set these specific parameters using this menu.

The final piece of advice we will give is to always ensure a user is part of a facility and then assigned to at least one role. Users without a role or facility are considered "orphans," and may lead to some error messages popping up. So long as you follow those basic principles, your organization should work out fine!