2025

CMS 2.0: User Management

REACH Media Network

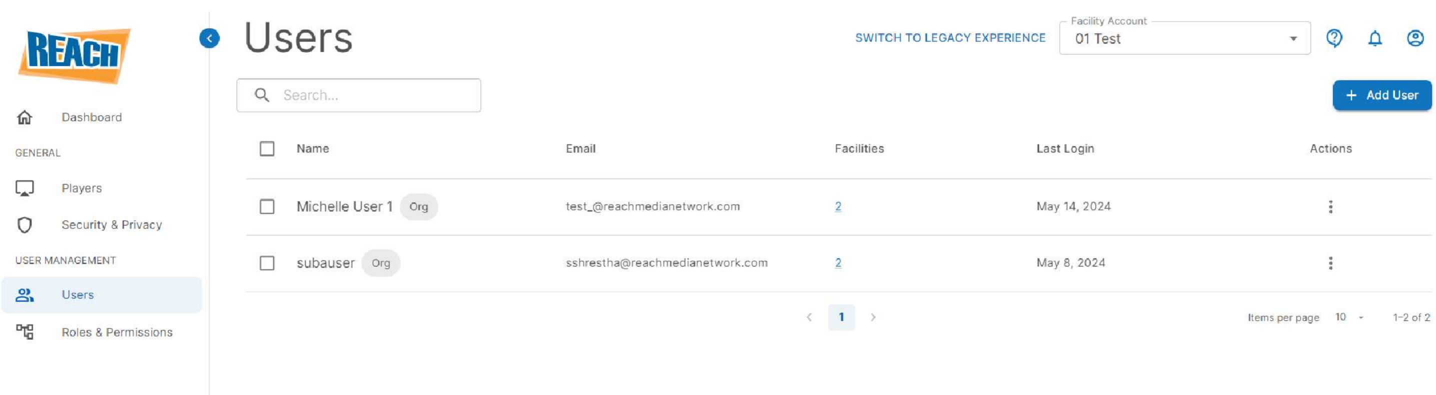
OVERVIEW

On our older CMS software, clients would have to reach out to their account manager to create new users. In CMS 2.0, facility owners and admins now have the power to create their own users, as well as assign which facilities and permissions that user will have access to. We hope this gives clients better control over who is working within their signage network as well as strengthens client security.

In this document, we will go over how you can manage users using the "Users" tab in the admin panel, as well as how to create new users. For a more in-depth article on what you can do within the admin panel, please check out our "Admin Panel" tutorial for CMS 2.0!

USERS OVERVIEW

To access the user management tools, click on your profile icon at the top right of the screen and select the "Admin Panel" option. This will bring you to the admin panel. From there, click on the "Users" tab located along the left-hand toolbar. You should then see a menu similar to the one below.



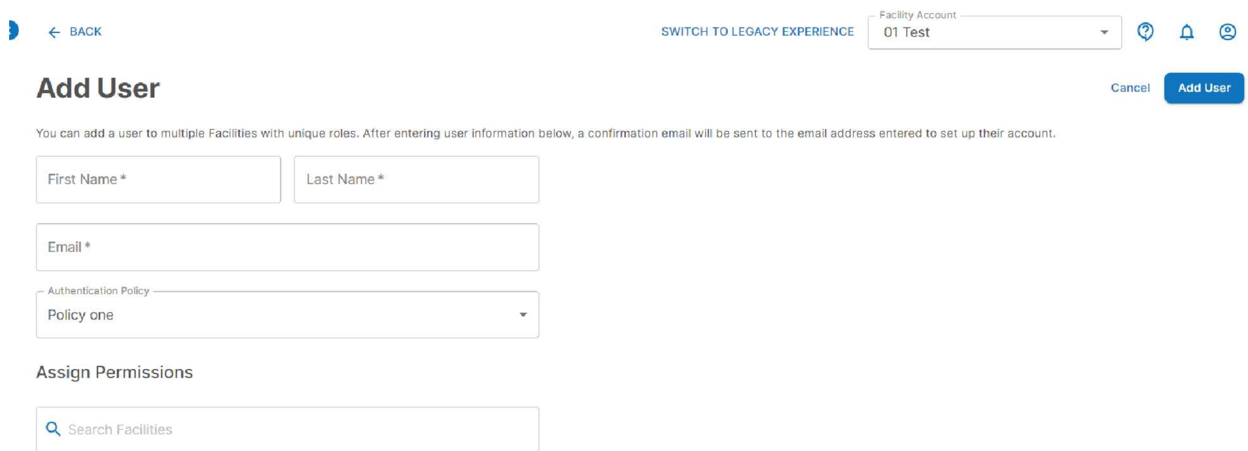
This is your user menu. Here you can manage all your users, create new ones, and view facility assignments. You will be able to view the name, email, number of assigned facilities, and the last login for each user in your team. If you ever need to remove a user, simply click the 3 dots off to the right and select the "delete" option. Or, you can check the box next to each user you wish to remove and then select "delete" from the option in the top row.

Next to each user, you may see a little label or tag next to their name. These are called "chips." If a user has an "Org" chip next to their name, that means they have access to an organization. Keep in mind, users can still be a part of your organization even if they have no access to any apps. These chips will help clients with large user lists to easily parse through organizations to see which users are a part of each group.

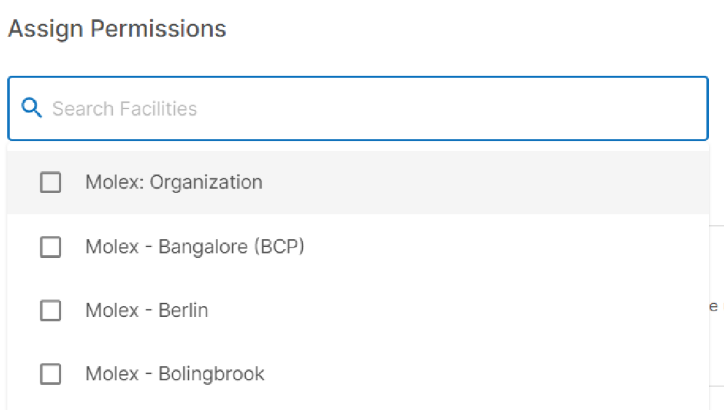
This menu is meant to provide a quick snapshot of your user base and help you easily find members within an organization. When new users are added to an organization, they will inherit the permissions native to that group!

CREATING A NEW USER

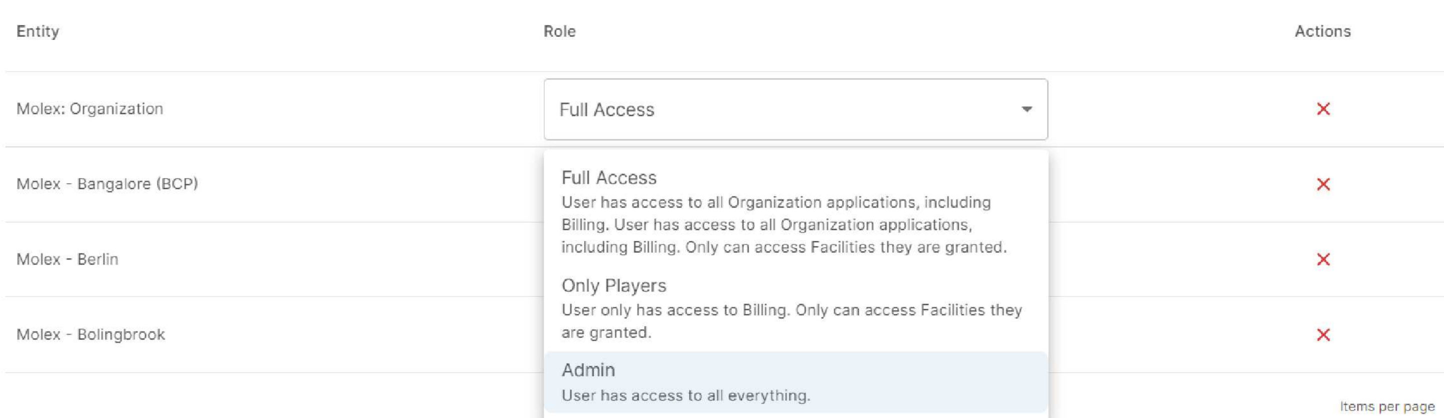
To get started, click the "Add User" button along the top-right side of the menu. This should open a menu for adding new users.



From here, enter the necessary information for your user. If you have an SSO policy, you will assign it to that user under "Authentication Policy." When you're ready to start assigning your new user to one or multiple facilities, head to the facility search bar under "Assign Permissions." Here, you can search up your locations and add them as part of your users' facility network.



Once you have a few facilities selected, you'll notice a running list of your assigned facilities appear at the bottom of the page. It is here you will assign roles and permissions.



As you can see, REACH has a few default roles built-in to help you organize user permissions.

"Full Access" gives you access to all organization apps and billing functions. Users will only have access to the facilities they are assigned to.

"Only Players" will restrict them to only access the billing portions of the facilities they are assigned to.

"Admin" will give the user access to everything within your CMS. While these are REACH's default roles, you can add your own roles under the "Roles and Permissions" tab.

For Organization roles, there's the owner, who has full access to your CMS library. There will also be a "Admin" role that will give you full access to the admin panel, as well as the ability to read, write, and access all applications.

The "Content Creator" role will give you the ability to read, write, and access the media library, playlist, and dashboard apps!

One person must be a designated "owner" for each site for proper CMS function. This role cannot be deleted, and if any other user is granted this role, you will be giving them complete access as well.

We recommend knowing roughly how many facilities you will need in your network before creating users. This way, you will be able to assign them to roles and facilities in a more efficient manner.

On a final note, REACH has an onboarding process for new users called "Intercom." Intercom will guide new users through the CMS and the apps they will have access to. Once users receive an onboarding email and click the link to activate their account, the onboarding process through Intercom will begin!