Portal Prodigy™
User Groups and Security in Detail

Chapter Excerpt from Software User & Administration Guide
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www.portalprodigy.com

1.1 Introduction

This chapter describes how PORTALPRODIGY security works. PORTALPRODIGY uses a role based security model to control access to the various feature components and resources contained within your Website. Instead of calling them roles, PORTALPRODIGY uses the term Security Groups. Thus Contacts are assigned to Security Groups which grant permissions to the various feature components and resources. Contacts (Users) are assigned to Security Groups using Contact Management. Security Groups are created and maintained using Security Group Management.

Contacts can be assigned to more than one Security Group. When a Contact is assigned to more than one Security Group, PORTALPRODIGY grants the Contact the highest level access permissions amongst the assigned Security Groups. In other words, PORTALPRODIGY looks into each Security Group that the Contact belongs to and determines the highest level access permissions for the particular resource the Contact (User) is attempting to access.
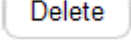
Security Group Management provides a list of Feature Components Resources. Each of the listed Feature Components Resources has three levels of access permissions:

- **No Access:** used to deny access. The user will get a message that they do not have access permissions to the requested Resource.

- **Read Only:** used to grant access for viewing only. The user will not be allowed to add, edit or delete data.

- **Edit:** used to grant full rights. The user will be allowed to add, edit and delete data.

PORTALPRODIGY comes with some pre-installed Security Groups, which are shown in the image below:

Some of the pre-installed Security Groups cannot be deleted. This is because they are used for special purposes that are described in the Security Feature Components section of this Chapter.

When a Security Group is special and cannot be deleted, the Delete button will be not be visible on the Security Management page.

All visitors to your PORTALPRODIGY based Website are automatically assigned to the *Visitor* Security Groups. Consequently you can control visitor access by editing the *Visitor* Security Group.

If a visitor is not logged into your Website and attempts to access something that requires permission to access, PORTALPRODIGY will prompt the visitor to login. If after logging in the visitor does not belong to a Security Group that has been granted access permission to the feature component or resource they are attempting to access, PORTALPRODIGY will notify the visitor of this.

When a visitor signs-up on your Website, a process that involves filling out a registration form, PORTALPRODIGY automatically assigns them to the *User* Security Groups. Consequently you can control the access permissions of registered users by editing the *User* Security Group.

Memberships can be configured to automatically assign users to a specified Security Group. They can even be assigned to different Security Groups based on their membership standing such as whether they are an applicant pending membership approval, an approved and active member, or a lapsed member.

PORTALPRODIGY also provides the ability to make an individual resource such as a specific discussion, document, event, or survey private. When a resource is made private, the visitor must belong to a Security Group that has been assigned to the resource. Security Groups are assigned to resources in the management component for the resource. For example, to make an Event private, a permitted administrator selects by retrieved the Event in Event Management and changing the Private field from *No* to *Yes*. The administrator then selects each Security Group that is granted access to the event.

PORTALPRODIGY offers another type of user group called Special Interest Groups. Special Interest Groups are used to categorize contacts and are highly useful for sending targeted email, postal mailings, product promotion coupons and or printing contact lists. Permitted administrators create Special Interest Groups using the Groups Management feature. Selected Special Interest Groups can be offered as choices on the user signup (registration) page. Special Interest Groups can also be assigned using the Contact Management feature.

User Groups and Security benefits include:

- Role based security model.

- Ability to individually assign for each feature based and role either: *No Access*, *Read Only*, or *Edit Rights*.

- Ability to designate content (data such as events, documents, etc.) as Private and limit access to permitted Security Groups (Roles).

- Secure pages and content protected by SSL 128 bit encryption.

- Encryption supported with certificate from certified authentication authority.

- Allows creation of unlimited number of roles (Security Groups).

▪ Visitors automatically assigned to a controllable Security Group.

▪ Ability to automatically assign roles and access rights upon user signup and membership registration.

▪ Each membership type may be configured to assign different roles and access rights.

▪ Set minimum required password length.

▪ Ability to disable signup (registration) option.

▪ Authorized Administrator can individually assign roles (Security Groups) to users, members and other contacts via the Contact Management feature.

▪ Ability to define Special Interest Groups for categorizing users, members and other contacts.

▪ Send targeted email and/or print campaigns to selected Special Interest Groups or Security Groups (Roles). Can be used for product promotions, membership drives, calls to action, etc.

▪ Users can be given access to assign themselves to selected Special Interest Groups when registering and when updating their user profile.

Some of the components of the User Groups and security feature, discussed in detail in this chapter, are:

Login page:
Login Name Field
Password Field
Login option
New User Signup option
Not permitted access message

Groups page:
Include Deactivated Records option
Manage Security Groups option
Manage Special Interest Groups option
Listing of Security Groups
Add New Security Group option
Print page option

Pre-defined Security Groups:
Admin
Customer
Member
Registrant
Resource
Users
Visitors

Security Group Management page:
Group Name
Created By User and Date
Last Modified By User and Date
Active flag
Chapter ID
For each Resource:
▪ Resource Name
▪ No Access option
▪ Read Only option
▪ Edit option

Resources:
Administration Of Advertisements
Administration of Appearance
Administration of Broadcasting
Administration of Categories
Administration of Companies
Administration of Discussions
Administration of Documents
Administration of Events
Administration of Exchanges
Administration of LRCA

Administration of Member Directories
Administration of Members
Administration of News
Administration of Newsletters
Administration of Notes Created by All
Administration of Notes Created by User
Administration of Orders
Administration of Payments
Administration of Press Releases
Administration of Products
Administration of Reporting
Administration of Reports Maintenance
Administration of Site Main Menu
Administration of Surveys
Administration of Users and Security
Administrator Entry for Member Advertisement (Client Part)
Ask The Expert (on Public portion of the site)

Biographies (on Public Portion of Site)
CAdministration of CreditApps
CCAdmin (Client & Company)
Discussions Add Topics (on Public portion of site)
Discussions Browse (on Public portion of site)
Discussions Reply (on Public portion of site)
Events (on Public portion of site)
Exchanges(on Public portion of site)

Import Queries
LRCA (LRCA (on Public Portion))
Member Directories(on Public portion of site)
Membership Types (Client Part)
Membership Types (Client Part)
News (on Public portion of site)
Page Main
Press Release(on Public portion of site)
Product Download

Products and Orders (on Public portion of site)
ResourceDocLibrary-Add&Update (Public)
Resources (on Public portion of site)
Run Query
Surveys (on Public portion of site)
View Registrants (on Public portion of site)

1.2 The Visitor Experience

Visitors that are not logged in are prompted to Login whenever they attempt to access something that requires access permission. A login form such as the following is displayed:

Once a visitor has logged into the Website, whenever they attempt to access something that they do not have permission to access, PORTALPRODIGY will display a message like the following:

1.3 Components

User Groups and Security provides the following components:

1.3.1 Groups page:
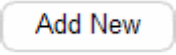
- **Include Deactivated Records:** used to view Security Groups that have been deactivated. Defaults to unchecked, which hides deactivated Security Groups. Contacts (Users) can only be assigned to active Security Groups.

- **Type:** used to toggle between viewing the following:

  o **Security** – select to view Security Groups. Security Groups are used for the purposes of granting or denying access rights to the various Feature Components and Resources contained within your PORTALPRODIGY based Website.

  o **Special Interest** – select to view Special Interest Groups. Special Interest Groups do not grant access permissions to resources. They are used to assign Contacts to groups for retrieval, reporting and broadcasting purposes.

- **Admin** – used to assign full access rights to all Feature Components and Resources contained within your PORTALPRODIGY based Website. This Security Group cannot be edited or deleted.

- **Customer** – used to assign access rights to customers. This Security Group is added a convenience. It can be edited or deleted. It is recommended to not delete it because there are certain features that automatically search for Contacts (Users) assigned to this Security Group.

- **Member** – used to assign access rights to customers. This Security Group is added a convenience. It can be edited or deleted. It is recommended to not delete it because there are certain features that automatically search for Contacts (Users) assigned to this Security Group.

- **Registrant** – used to assign access rights to Event Registrants. This Security Group is added a convenience. It can be edited or deleted. It is recommended to not delete it because there are certain features such as Event Management that automatically search for Contacts (Users) assigned to this Security Group.

- **Resource** – this Security Group is added a convenience. It can be edited or deleted. It is recommended to not delete it because there are certain features that automatically search for Contacts (Users) assigned to this Security Group.

- **Users** – this is a special Security Group that is assigned to everyone that visits your PORTALPRODIGY based Website. It is used to assign the lowest level of access rights to visitors of your Website that have not logged in. This Security Group cannot be deleted. To require everyone to log into your Website before gaining access, set all Resources for this Security Group to No Access. When someone attempts to access your Website, they will immediately be prompted to login.

- **Visitor** – this is a special Security Group that is assigned to everyone that visits your PORTALPRODIGY based Website. It is used to assign the lowest level of access rights to visitors of your Website that have not logged in. This Security Group cannot

be deleted. To require everyone to log into your Website before gaining access, set all Resources for this Security Group to No Access. When someone attempts to access your Website, they will immediately be prompted to login.

Options:

- Add New : the Add New button is used to create a new Security Group.

- Print : the Print button prints the browser window according to the users prints settings.

- Main Menu : closes the page and returns to the Site Administration Menu.

1.3.2 Security Group Management page:

This is where you assign access rights to security groups.

Security Group Management

Group Info	
Group Name:	
Created:	
Modified:	
Active:	Yes
Chapter ID:	1
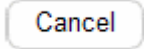
- **Group Name:** this is where you enter a name for the Security Group. It is a good idea to use names that describe the role of users assigned to the Security Group.

- **Created:** the name of the user that created the record and the date it was created. Lists user's first name followed by last name.

- **Modified:** the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.

- **Active:** by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary

ownership of the record. For further information see the chapter on Site Synchronization.

Feature Components

Resource	No Access	Read Only	Edit
Administration Of Advertisment	●	○	○
Administration of Appearance	●	○	○
Administration of Broadcasting	●	○	○
Administration of Categories	●	○	○
Administration of Companies	●	○	○
Administration of Discussions	●	○	○
Administration of Documents	●	○	○
Administration of Events	●	○	○
Administration of Exchanges	●	○	○
Administration of LRCA	●	○	○
Administration of MemberDirectories	●	○	○
Administration of Members	●	○	○
Administration of Membership Types	●	○	○
Administration of News	●	○	○
Administration of Newsletters	●	○	○
Administration of Notes Created by All	●	○	○
Administration of Notes Created by User	●	○	○
Administration of Orders	●	○	○
Administration of Payments	●	○	○
Administration of Press Releases	●	○	○
Administration of Products	●	○	○
Administration of Quick Registration Builder	●	○	○
Administration of Reporting	●	○	○
Administration of Reports Maintenance	●	○	○
Administration of Site Main Menu	●	○	○
Administration of Surveys	●	○	○
Administration of Users and Security	●	○	○
Administrator Entry for Member	●	○	○
Advertisment (Client Part)	○	○	●
Biographies (on Public Portion of Site)	○	○	●
CAdministration of CreditApps	●	○	○
CCAdmin (Client & Company)	●	○	○
Discussions Add Topics (on Public portion of site)	○	○	●
Discussions Browse (on Public portion of site)	○	○	●
Discussions Reply (on Public portion of site)	○	○	●
Event Registrants (on Public Portion)	○	○	●
Events (on Public portion of site)	○	○	●
Exchanges(on Public portion of site)	○	○	●
Import Queries	●	○	○
LRCA (on Public Portion)	○	○	●
Member Directories(on Public portion of site)	○	○	●
Membership Types (Client Part)	○	○	●
News (on Public portion of site)	○	○	●
Page Main	○	○	●
Press Release(on Public portion of site)	○	○	●
Products and Orders (on Public portion of site)	○	○	●
Resource Document-Add&Update (Public)	●	○	○
Resources (on Public portion of site)	○	○	●
Surveys (on Public portion of site)	○	○	●

- **Resource:** lists the names of the various Feature Components provided by PORTALPRODIGY. PORTALPRODIGY provides this list for you. Feature Components can be pages, options, or groups of pages related to a process or function.

- **No Access:** used to deny access. The user will get a message that they do not have access permissions to the requested Resource.

- **Read Only:** used to grant access for viewing only. The user will not be allowed to add, edit or delete data.

- **Edit:** used to grant full rights. The user will be allowed to add, edit and delete data.

Option Buttons:

- [Save] used to save the settings and continue working on the page.

- [Delete] used to delete the Security Group. PORTALPRODIGY will prompt to confirm deletion of the Security Group. Select OK to confirm the deletion or CANCEL to abort the deletion.

- [Print] used to print the current page (contents of your browser window) according to your browser's print settings.

- [Cancel] used to close the page discarding all entries and edits.

- [Close] used to close the page and save changes. PORTALPRODIGY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.4 Feature Administration

The Administrator experience has already been described in the other sections of this chapter, thus we will not bore you by repeating it here.

1.5 Tutorials
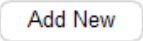
The following tutorials explain how to setup and manage security and special interest groups, assign access rights, and set private access to resources.

1.5.1 Add a new Security Group

- From the Site Administration Menu Site Management section click on the edit icon ![edit icon] for Security.

- Click on [Add New] to create a new Security Group.

- In the Group Info section enter a name for the new security group.

Feature Components

Resource	No Access	Read Only	Edit
Administration Of Advertisment	●	○	○
Administration of Appearance	●	○	○
Administration of Broadcasting	●	○	○
Administration of Categories	●	○	○
Administration of Companies	●	○	○
Administration of Discussions	●	○	○
Administration of Documents	●	○	○
Administration of Events	●	○	○
Administration of Exchanges	●	○	○
Administration of LRCA	●	○	○
Administration of MemberDirectories	●	○	○
Administration of Members	●	○	○
Administration of Membership Types	●	○	○
Administration of News	●	○	○
Administration of Newsletters	●	○	○
Administration of Notes Created by All	●	○	○
Administration of Notes Created by User	●	○	○
Administration of Orders	●	○	○
Administration of Payments	●	○	○
Administration of Press Releases	●	○	○
Administration of Products	●	○	○
Administration of Quick Registration Builder	●	○	○
Administration of Reporting	●	○	○
Administration of Reports Maintenance	●	○	○
Administration of Site Main Menu	●	○	○
Administration of Surveys	●	○	○
Administration of Users and Security	●	○	○
Administrator Entry for Member	●	○	○
Advertisment (Client Part)	○	○	●
Biographies (on Public Portion of Site)	○	○	●
CAdministration of CreditApps	●	○	○
CCAdmin (Client & Company)	●	○	○
Discussions Add Topics (on Public portion of site)	○	○	●
Discussions Browse (on Public portion of site)	○	○	●
Discussions Reply (on Public portion of site)	○	○	●
Event Registrants (on Public Portion)	○	○	●
Events (on Public portion of site)	○	○	●
Exchanges(on Public portion of site)	○	○	●
Import Queries	●	○	○
LRCA (on Public Portion)	○	○	●
Member Directories(on Public portion of site)	○	○	●
Membership Types (Client Part)	○	○	●
News (on Public portion of site)	○	○	●
Page Main	○	○	●
Press Release(on Public portion of site)	○	○	●
Products and Orders (on Public portion of site)	○	○	●
Resource Document-Add&Update (Public)	●	○	○
Resources (on Public portion of site)	○	○	●
Surveys (on Public portion of site)	○	○	●

- For each Feature Component, set the access permissions assigned to the new security group.   The choices are *No Access*, *Read Only*, or *Edit* .

- When finished click on [Close] and confirm save.


1.5.2Make a Resource Private:

By default, resources are made available to everyone who has access to the Resource Library. The following steps explain how to secure a document and limit access to permitted users. The steps are similar for all other types of resources such as Discussions, Events, Surveys, etc.
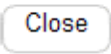
- Retrieve the document using Search For Documents page.

- In the Record tab section set Private to YES.

- When Private is set to YES the Security Groups tab section is displayed just below the option buttons at the bottom of the page.
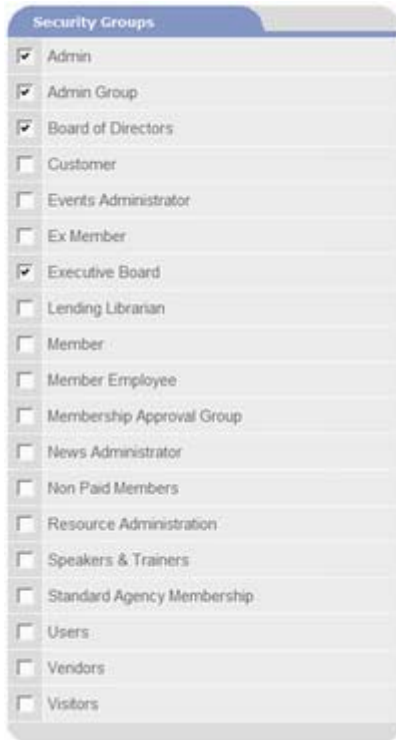
- Check each Security Group that is permitted to access the document.

- When finished click on `Close` and confirm save.

Note that you may also control access to documents by limiting access to Document Categories (see the following section How To Make a Document Category Private) and by limiting access to the Documents Resource Library (see the Chapter on Security).

1.5.3 Assign a Contact to Security Groups:

- Retrieve the Contact in Contact Administration. If you do not know how to this see the Chapter on Contacts Features in Detail.
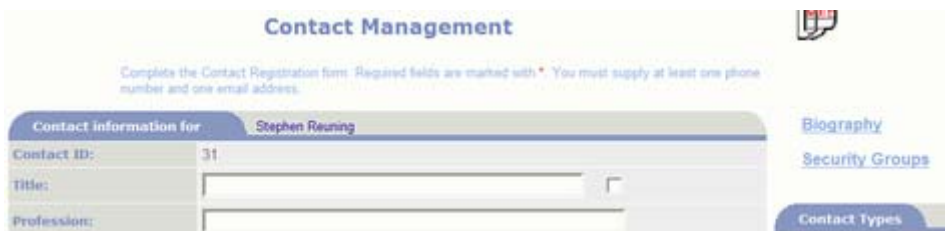
- Click on the **Security Groups** link located near the upper right hand corner of the page to display the User Management page shown below:

- Check each Security Group that you want the Contact to belong to.

- When finished click on **Close** and confirm save.