Add Users and Manage Permissions with Liferay DXP

Exercises Script

# Exercise 1: Slides

Slide 15:

In this Exercise, we’ll Create New Users for our Mondego platform.

Slide 16:

Our Objectives for this exercise are as follows. We will:

Create a new platform administrator

Create two new Users while signed in as the new administrator

Give the new Users passwords and access to the Mondego Group Site

Slide 17:

The steps we have for this exercise can be broken down into three main parts. First, we will:

Create a new platform administrator, Elliot Quinn

Give Elliot a Password

Make Elliot an Administrator

Sign in as Elliot Quinn

Slide 18:

Next, we will:

Create the User Naomi Engel

Give Naomi a Password

Give Naomi Access to the Mondego Group Site

Slide 19:

And finally, we will:

Create the User Ayokunle Idowu [Eye-yo-kun-ley Ee-do-woo]

Give Ayokunle a Password

Give Ayokunle Access to the Mondego Group Site

Slide 20:

We also have a Bonus Exercise:

Create a new User, Bethany Park. Give Bethany a password, access to the Mondego Group Site, and the phone number (314) 157-2757 as Contact Information.

We won’t go over this exercise in the video, but feel free to complete it on your own.

# Exercise 1: Content

Part 1:

Our first step is to create a new platform Administrator for the Mondego Group.

Sign in to Liferay as your default administrator if you're not already logged in. This should be using [test@mondego.com](mailto:test@mondego.com) if you followed along with the Foundations course or the Build New Sites exercises.

Open the *Global Menu.* Go to Control Panel > Users > Users and Organizations.

Click the Add icon at the top right to add a User.

Type “elliot.quinn” for the Screen Name and [elliot.quinn@mondego.com](mailto:elliot.quinn@mondego.com) for the Email Address.

For the name, we have “Elliot” as the First Name and “Quinn” as the Last Name.

Click *Save* at the bottom.

Part 2:

Next, we’ll give Elliot a Password.

Click on *Password* in the left menu.

Type a new password in the New Password and Enter Again fields. For simplicity, we can use “test,” but we will need to change the password in a minute when we first sign in as Elliot.

Click *Save*.

Part 3:

We’ll now make Elliot a platform Administrator.

Click on *Roles* in the left menu.

Click Select at the top right next to Regular Roles and choose *Administrator*.

Click *Save*.

We’ll discuss Roles and how to use them in more detail in Exercise 3 of this module.

Part 4:

Now that we’ve finished creating our new Administrator, we will sign in as Elliot to complete the rest of the exercise steps.

Click on the *Personal Menu*, which is this icon that looks like a person, on the right side by the Global Menu, and choose *Sign Out* at the bottom.

Once we’re signed out, click *Sign In* at the top to sign in as Elliot Quinn. So, we’ll use the email we just created, [elliot.quinn@mondego.com](mailto:elliot.quinn@mondego.com), and the password we added.

Click *I Agree* on the Terms of Use page.

And now we need to change our password. So, we’ll type our new password in the *New Password* and *Enter Again* fields and then click *Save*.

We’ll also choose a password reminder question and then add our answer to that reminder. Then click *Save*.

And now we’re signed in as our new Administrator, Elliot.

Part 5:

Next, we’ll add a few additional Users to our platform.

Open the Global Menu and go to Control Panel > Users and Organizations.

Click the Add icon at the top right to add a User.

Type “naomi.engel” as the Screen Name and [naomi.engel@mondego.com](mailto:naomi.engel@mondego.com) as the Email Address.

And we’ll add “Naomi” as the First Name and “Engel” as the Last Name.

Click *Save* at the bottom.

Part 6:

Click on *Password* in the left menu to give Naomi a password.

Type a new password in the *New Password* and *Enter Again* fields. Remember, we will have to change this password the first time we sign in as Naomi.

Click *Save*.

Part 7:

We’ll now give Naomi access to the Mondego Group Site.

Click on *Memberships* in the left menu.

Click *Select* at the top right next to Sites and choose *Mondego Group*.

Click *Save*.

Part 8:

We’ll add another new User.

Go back to the Users page clicking the *Back* icon at the top. You can also use the Control Panel.

Click the Add button at the top right to add a User.

Type “ayokunle.idowu” as the Screen Name and [ayokunle.idowu@mondego.com](mailto:ayokunle.idowu@mondego.com) as the Email Address.

Type “Ayokunle” as the First Name and “Idowu” as the Last Name.

Click *Save* at the bottom.

Part 9:

And just like with Elliot and Naomi, we’ll give Ayokunle a password and membership.

Click on *Password* in the left menu and type a new password in the *New Password* and *Enter Again* fields.

Click *Save*.

Part 10:

Then, we’ll click on *Memberships* in the left menu.

Click *Select* at the top right and choose *Mondego Group*.

Click *Save*.

*(End of Video 1)*

# Exercise 2a: Slides

Slide 30:

In this exercise, we’ll create an Organization Hierarchy

Slide 31:

Our Objectives for this exercise are to:

Create a Basic Mondego Organization Hierarchy

Create Mondego Organization Sites

Assign a Mondego User to a Mondego Organization

Slide 32:

We’ll take the following steps:

Create a New Mondego Investments Organization

Create a Sub-Organization for Investment Marketing

Create an Organization Site for Investment Marketing

Create a Sub-Organization for Investment Advisors

Create an Organization Site for Investment Advisors

Assign Naomi Engel to the Investment Marketing Organization

Slide 33:

We also have a Bonus Exercise that you can complete on your own:

Create Sub-Organizations under Investment Marketing for Sales, Design, and Events. Add appropriate tags for each sub-organization. Assign Bethany Park to the Sales Organization.

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# Exercise 2a: Content

Part 1:

First, we need to make sure that we are signed in as our main Administrator, Elliot Quinn.

Then, we can proceed to create a New Mondego Investments Organization.

Open the Global Menu and go to Control Panel > Users and Organizations.

Click on the *Organizations* tab and click the *Add* button at the top right to add a new Parent Organization.

Type “Mondego Investments” for the Name.

Click *Save* at the bottom.

Part 2:

We’ll now create a sub-organization for Investment Marketing

Click the *Back* icon at the top left.

Next to the Mondego Investments organization we just made, click on the *Options* icon and click *Add Organization.*

Type “Investment Marketing” as the Name.

Scroll down and type “marketing” in the Tags field.

Press *Enter* or use a comma to add the new tag.

Type a second tag, “investments,” and hit *Enter* again.

Click *Save* at the bottom.

Part 3:

For this sub-organization, we also want to create an accompanying Site.

In the left menu, click *Organization Site* and click the *Create Site* toggle to add a Site.

Click *Save* at the bottom.

Part 4:

We’ll now add another sub-organization for the Investment Advisors.

Click the *Back* icon at the top to go back to our sub-organizations.

Click the *Add* button at the top right and choose *New Organization.*

Type “Investment Advisors” for the *Name*.

And under Tags, type “advisors” and hit enter and then “investments” and hit enter again.

Click *Save* at the bottom.

Part 5:

We’ll also create an organization site by going to *Organization Site* in the left menu and clicking the *Create Site* toggle.

Click *Save* at the bottom.

Part 6:

Now that we have our Organizations created, we can assign Users to them.

Click the *Back* icon at the top to return to the Mondego Investments Organization.

Click on the *Options* icon to the right of *Investment Marketing* and choose *Assign Users*.

Click the checkbox next to Naomi Engel and click *Done*.

*(End of Video 2)*

# Exercise 2b: Slides

Slide 34:

In this exercise we will Create and Manage User Groups.

Slide 35:

Our Objectives for this exercise are:

Create three User Groups for the Mondego Credit Card Tiers

Assign a User to one of the new User Groups

Create a User Group Site

Slide 36:

Our Exercise Steps will be:

Create the Mondego Silver Cards User Group

Create the Mondego Gold Cards User Group

Create the Mondego Platinum Cards User Group

Assign Naomi Engel to the Mondego Platinum Cards User Group

Create a Mondego Platinum Cards Private User Group Site

Add Fragments and Widgets to the Account Overview Page

Configure the Fragments on the Account Overview Page

Slide 37:

We also have a Bonus Exercise that we won’t go over in the video:

Create Private Account Overview Pages for the Mondego Gold and Silver Cards User Group Sites using different fragments and widgets than the Mondego Platinum Cards Page. Add Ayokunle Idowu to the Mondego Gold Cards User Group. Sign in as Ayokunle to confirm access to the Account Overview page.

# Exercise 2b: Content

Part 1:

Before we begin, make sure you are signed in as an Administrator. If you’re proceeding immediately from the Create an Organization Hierarchy exercise, you should be signed in as Elliot Quinn.

First, we’ll open the *Global Menu* and go to Control Panel > User Groups.

Click the *Add* icon at the top right to add a new User Group.

Type “Mondego Silver Cards” as the *Name* and click *Save* at the bottom.

Part 2:

We’ll create another User Group by clicking the *Add* button at the top right.

This one will be named “Mondego Gold Cards.”

Click *Save* at the bottom.

Part 3:

And, for our last User Group, we’ll again click the *Add* button at the top right.

And this one will be called “Mondego Platinum Cards.”

Click *Save* at the bottom.

Part 4:

Now that we’ve created our User Groups, we can assign Users to the groups. We want to assign Naomi Engel to the Platinum Cards group.

Click the *Options* icon, the three dots, next to *Mondego Platinum Cards* and click *Assign Members*.

Click the *Add* button at the top right to add a new User and select Naomi Engel by clicking the checkbox.

Click *Add* at the bottom right.

Part 5:

For the *Platinum Cards* User Group, we also want to create a User Group Site.

Click the *Back* arrow to return to our list of User Groups and click the *Options* icon by *Mondego Platinum Cards* again. This time, choose *Manage Pages*.

Click the *Add* icon at the top right to add a new page and choose *Private Page*.

Click *Blank* to add a Content Page and call this page “Account Overview”.

Click *Add*.

Part 6:

Now that we have our Account Overview Page, we’ll add Fragments and Widgets to it.

Open the *Fragments and Widgets* panel on the right if it hasn’t automatically opened.

Under the *Fragments* tab, find the *Grid* fragment and drag it onto the page.

Click on the *Grid* to select it and, under the *General* tab in the *Browser*, choose two modules from the *Number of Modules* dropdown option.

Go to the *Menu Display* section and drop a *Menu Display* fragment onto the left column of the page.

Next, we’ll switch to the *Widgets* tab and find the *Highlighted* section. Drop a *Web Content Display* widget onto the right column.

Finally, go to the *News* section under *Widgets* and drop an *Alerts* widget onto the right column below the *Web Content Display*.

Part 7:

Before we publish the page, we need to configure the fragments and widgets.

Select the *Grid* fragment and drag the divider to make the left column smaller than the right.

Select the *Menu Display* fragment and, on the *General* tab, click the *Change Source* icon beside the Source.

Choose *Private Pages Hierarchy* and click *Select This Level.*

Now click the *Publish* button at the top right.

Open the options menu beside the *Mondego Platinum Cards* User Group and click *Go to Dashboard Pages* to view the new *Account Overview* page.

*(End of Video 3)*

# Exercise 3a: Slides

Slide 47:

In this exercise, we will Customize the Site Content Reviewer Role.

Slide 48:

Our Objectives for this exercise are as follows. We will:

Modify the Site Content Reviewer Role to include:

Edit and View permissions for Web Content

And Edit and View permissions for Blogs

Slide 49:

We’ll accomplish this using the following steps:

View the Default Roles on the Site Roles tab in the Roles section of the Control Panel

Add Web Content Editing and View Permissions

Add Blog Editing and View Permissions

Slide 50:

We also have one Bonus Exercise for this module:

Create a new User and make them a member of the main Mondego Site. Grant the new User the Site Content Reviewer role.

We won’t go over this exercise in the video, but feel free to complete it on your own.

# Exercise 3a: Content

Part 1:

Before we begin, make sure you are signed in to Liferay as your Administrator. If you followed along with the Bonus Exercise in “Create and Manage User Groups” you may need to sign out as Ayokunle and sign in as your Administrator, Elliot Quinn.

To start off, we want to View the default Roles.

Open the *Global Menu* and go to the Control Panel > Roles.

Click the *Site Roles* tab. You can see that we have a number of default Site Roles.

Part 2:

We’ll now add permissions to one of our default Roles.

Click on the *Site Content Reviewer Role* and choose the *Define Permissions* tab.

Open the *Site and Asset Library Administration* drop-down and find *Content & Data.*

Open the *Content & Data* drop-down and click the Web Content option.

Check *Update* under *Web Content Article.*

Check *View* under *Web Content Article*.

Then, click *Save*.

Part 3:

We’ll go back to the *Site and Asset Library Administration* menu under *Content & Data*, and this time we’ll choose the *Blogs* option.

Check *Update* under *Blogs Entry.*

Check *View* under *Blogs Entry*.

Then, click *Save*.

*(End of Video 4)*

# Exercise 3b: Slides

Slide 51:

In this exercise, we will Create a Custom Site Role.

Slide 52:

Our Objective is to:

Create a Site Content Creator Role that allows the web content team to do the following:

Add and Edit Web Content

Add and Edit Blogs

Add and Edit Images

Slide 53:

We have several steps to accomplish this. We will:

Create a new Site Content Creator Role

Add Site Administration Access and View Permissions for Web Content

Add the Add Folder and View Permissions for Web Content

Add the Add Subfolder, Web Content, Update, and View Permissions for Web Content Folders

Add the Update and View Permissions for Web Content Articles

Slide 54:

Additionally, we will:

Add Site Administration Access and View Permissions for Blogs

Add the Add Entry Permission for All Blog Entries

Add the Add, Delete, Update Discussion, Update, and View Permissions for Blogs

Slide 55:

And, finally, we will:

Add Site Administration Access and View Permissions for Documents and Media

Add the Add Folder and View Permissions for Documents

Add the Add Subfolder, Document, Update, and View Permissions for Document Folders

Add the Update and View Permissions for Individual Documents

Slide 56:

We also have one bonus exercise:

Create a new User named Corrie Alders. Make Corrie a member of the Mondego Site. Assign Corrie the Site Content Creator role.

We won’t go over this in the video, but you can complete it on your own.

# Exercise 3b: Content

Part 1:

As usual, make sure you’re signed in as an Administrator.

We’ll start by opening the *Global Menu* and going to Control Panel > Roles.

Click the *Site Roles* tab and click the *Add* icon at the top right.

Type “Site Content Creator” as the title and “For creating content and blogs to design and market the Mondego brand” as the Description.

Click *Save*.

Part 2:

You’ll see we now have the *Define Permissions* tab. Click the *Define Permissions* tab. In our *Summary* you can see that this Role has no permissions yet.

Open the *Site and Asset Library Administration* drop-down. Scroll down to the *Content & Data* section and open that drop-down.

Click the *Web Content* option.

Check *Access in Site and Asset Library Administration* under *General Permissions*.

Check *View* under *General Permissions*.

Part 3:

Scroll down and under the *Web Content* check the boxes for *Add Folder* and *View.*

Part 4:

Under the *Web Content Folders* section, check the boxes for *Add Subfolder*, *Add Web Content*, *Update*, and *View*.

Part 5:

In the next section, *Web Content Articles,* check the *Update* and *View* boxes.

Then, click *Save* at the very bottom of the page.

Part 6:

Go back to the *Site and Asset Library Administration > Content & Data* and select *Blogs*.

Under *General Permissions*, check *Access in Site and Asset Library Administration* and *View*.

Part 7:

Scroll down to the *Blog Entries* section and check the box for *Add Entry*.

Part 8:

Under the *Blogs Entry* section check *Add Discussion*, *Delete Discussion*, *Update*, *Update Discussion*, and *View*.

At the bottom of the page, click *Save*.

Part 9:

Finally, we’ll add permissions for Documents and Media. Once again, go to the *Content & Data* section of the *Site and Asset Library Administration* menu. Click the *Documents and Media* section.

Check the boxes for *Access in Site and Asset Library Administration* and *View* under General Permissions.

Part 10:

Scroll down to the *Documents* section and check the boxes for *Add Folder* and *View*.

Part 11:

Under the *Documents Folder* section check *Add Document*, *Add Subfolder*, *Update*, and *View*.

Part 12:

Under the *Document* section, check the *Update* and *View* permissions, and then click *Save* at the very bottom of the page.

*(End of Video 5)*

# Exercise 4: Slides

Slide 63:

In this exercise, we’ll Manage Teams and Community Permissions on our platform.

Slide 64:

Our Objectives for this exercise are as follows:

Create a Site Team for the Mondego Group Site

Modify Permissions on a Resource on the Site

Slide 65:

The steps we will follow are:

Go to the Mondego Publications Site

Create a Web Moderators Team

Add Ayokunle Idowu [Eye-yo-kun-ley Ee-do-woo] to the Mondego Publications Site

Add Ayokunle Idowu to the Web Moderators Site Team

Create a new Community page

Add a Message Boards Widget to the new page

Grant the Web Moderators Team Permissions to the Message Boards Widget

Slide 66:

We also have some Bonus Exercises that you can complete on your own after the video:

Grant Bethany Park and Corrie Alders membership to the Mondego Publications Site. Add them to the Web Moderators Team. Sign out of your administrator account and sign in as either Bethany or Corrie.

Create at least one additional User and add them to the Web Moderators Team. Add a new Widget to the Community Page and grant permissions to the team.

# Exercise 4: Content

Part 1:

Make sure you’re signed in as your Administrator. We’ll need to switch from our default Site to the *Mondego Publications Site*. We can do that by opening the *Site Menu* and clicking the *Site Selector* icon, the compass, to view available Sites.

You’ll see the most recentSites in the first tab, but you can also click on the *My Sites* tab to view all available Sites.

If you've followed along with the Main and Bonus Exercises from the “Build New Sites with Liferay DXP” module, you should have seven Sites, five Mondego Sites and two Organization Sites.

Choose the *Mondego Publications* Site.

Part 2:

Now, we’ll create a *Web Moderators* Site Team.

Open the *Site Menu* and go to *People > Teams*.

Click the *Add* icon at the top right.

Type “Web Moderators” for the Name, and, as the description, type “A team for moderating message boards, blog comments, and community engagement.”

Click *Save*.

Part 3:

Before we can add Users to our Site Team, we need to make sure that we have Users available. Click *Web Moderators* to open the new team and click the *Add* icon at the top right. As you can see, our available User(s) is our Administrator. We need to grant Users membership before we can add them to the *Web Moderators* Team.

Close the pop-up and open the *Control Panel* in the *Global Menu*.

Go to *Users > Users and Organizations* and select *Ayokunle Idowu*.

Go to *Memberships* in the left panel.

Click *Select* next to *Sites* and choose *Mondego Publications*.

Click *Save* at the bottom of the page.

Part 4:

Now, we can add Ayokunle to the Site Team.

Open the *Global Menu* and select *Mondego Publications* from the Sites tab.

Open the *Site Menu* and go to *People > Teams*.

Click *Web Moderators* to open the team and click the *Add* icon at the top right.

Check the box next to Ayokunle Idowu.

Click *Add*.

Part 5:

Next, we’ll add a Community Page.

Open *Site Builder* in the *Site Administration* panel and click *Pages*.

Click *Add* at the top right and choose *Public Page*.

Click *Blank* to add a Content Page and name the page “Community.”

Click *Add*.

Part 6:

We want to add a Message Board to this page, so open the *Fragments and Widgets* menu using the plus icon at the right.

Go to the *Widgets* tab and scroll down to *Collaboration.*

Drop a *Message Boards* widget onto the page.

Click the *Publish* button at the top right. You should see two Public Pages: *Blog* and *Community*.

Part 7:

Now, we’ll make sure the Web Moderators have the appropriate permissions on the page. Click on the *Community* page.

Click on the *Options* menu, the three dots, next to the *New Thread* button.

Click *Permissions*.

Check every permission except for *Permissions* next to the *Web Moderators* role.

Click *Save* and close the pop-up.

*(End of Video 6)*