

## Access and Workflow 101







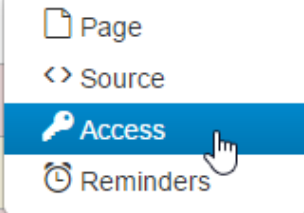






### Overview

OU Campus manages users and their ability to make changes via **access settings** and **workflow**. Access settings control what files users can view and edit; workflow is the process by which users submit files to other users for review and publication.

While simple on a base level, these two concepts can interact in increasingly complex ways. This page will talk about the basics of access and workflow; other pages in this category go far more in depth about the various aspects of these functions.

### Access Settings

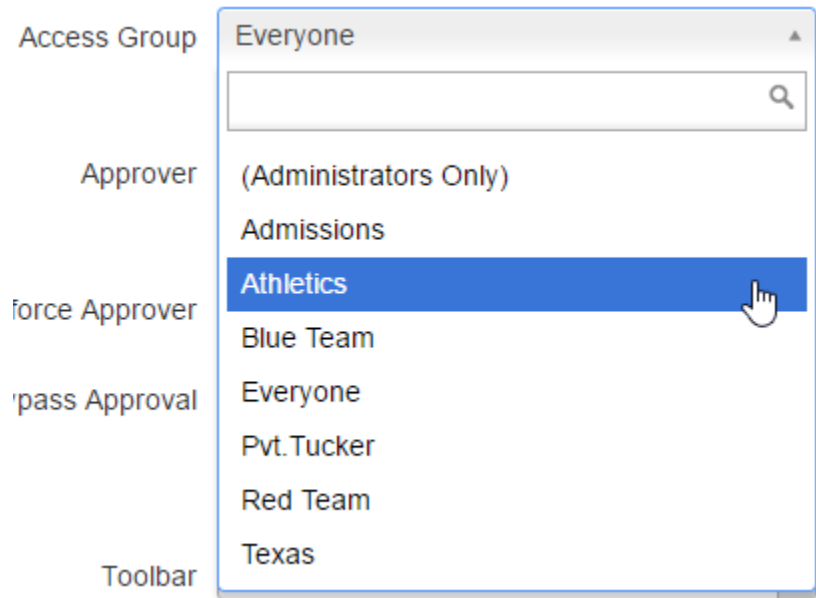
Access settings define who can make changes to a file, directory, site, asset, or other item in OU Campus. They are configured per item (not per user) - i.e., to control who can edit a certain page, you would change that page's settings.

<input type="checkbox"/>	 example.pcf	6.3K		09/09/16 14:36	 Edit ▾	 Review ▾
<input type="checkbox"/>	 final-exam-schedule.pcf	7.5K		27/07/15 10:24	 <ul style="list-style-type: none"><li> Page</li><li> Source</li><li> Access</li><li> Reminders</li></ul>	
<input type="checkbox"/>	 index.pcf	7.4K		10/11/15 11:09		
<input type="checkbox"/>	 library.pcf	7.4K		24/07/15 09:30		
<input type="checkbox"/>						

For more information on access settings:

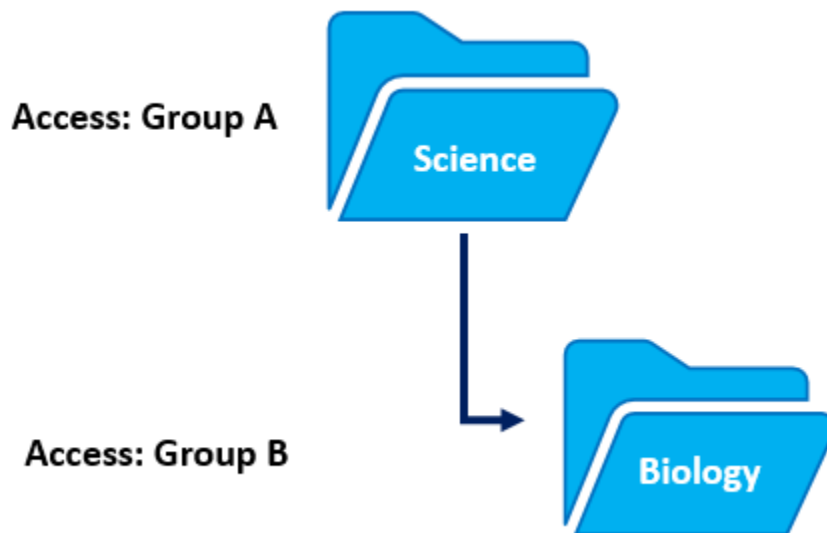
- [Binary File Access Settings](#)
- [Page Access Settings](#)
- [Directory Access Settings](#)
- [Site Access Settings](#)

Assigning access settings happens via groups. That is, you specify one, and only one, group that can access that file, directory, etc. Groups are comprised of users; therefore, if you have a certain user you wish to access a page, you must make sure they are part of the group that has access.



For more information, visit the [Groups](#) page.

Access settings can be defined for sites, directories, pages and files, and editable regions, among other things. Note that access settings can override each other. For example, directory access settings will take priority over site access settings, and page access settings will take priority over those for directories.



**Only members of Group B can access the Biology directory**

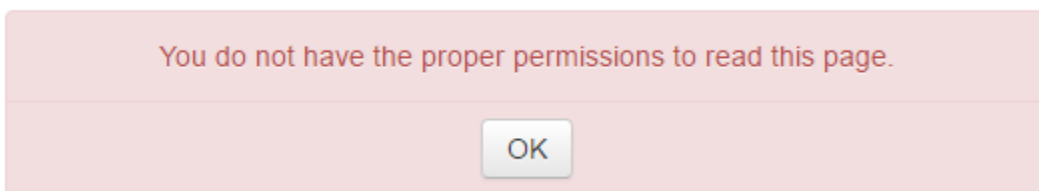
Remember, however, that if a user is navigating through the OU Campus file structure, they must be able to enter the parent directory to open any directories or files inside. Therefore, to access the Biology directory in the example above, a user must also be able to access the Science directory.

Because of this, a top-down approach is recommended for creating groups and access settings - start with the largest, most general groups, and become more specific as you work your way down the file structure.

For more information, visit the [Planning Access Settings](#) page.

### Restriction Messages

When a user attempts to log into a page they don't have access to via DirectEdit, they will be logged into OU Campus but will be unable to access the page, and will see the following message instead:



When navigating the file structure, directories and files that the user does not have access to will be un-clickable, and menu options will not appear on hover.

	academics-1		11/08/15 08:38
	admissions		10/11/15 11:19
	athletics		24/07/15 08:47
	blank.pcf	2.9K	24/03/16 11:13

### No access to "admissions" and "blank.pcf"

#### Recursive Modification

Access settings can be applied to folders recursively or non-recursively. When a setting is recursive, it is applied not only to the folder itself, but to all existing files inside, as well as any created in the future. When it is non-recursive, the setting is applied to the folder and any new files created going forward.

Unless specified otherwise, files and directories inherit the access settings of their parent directory when they are created.

For more information, visit the [Recursive Modification](#) page.

### Workflow

Workflow is the process of users submitting files to others for approval and publication. The video below provides an introduction to the process:

Settings that affect workflow exist in several locations. Whether a user has an approver assigned to them (to whom they must submit files instead of publishing them directly) is controlled from their user settings.

User Level

*Information on user levels*

Approver

*Who pages will be submitted for approval to. Individual pages can override this setting.*

Enforce Approver

*Prevents the user from specifying a different approver. This option applies account-wide.*

Users of any level, except level 10, can be assigned an approver. When an approver is assigned, the user cannot publish pages on their own; they must instead assign them to another user for approval. Enforcing the approver for that user prevents them from sending pages to any other user.

For more information, visit the [Restrictions](#) page.

However, approvers can be assigned for sites, pages and directories as well. This approver can also be enforced.

Approver

*Setting an approver overrides all users' approvers for this folder.*

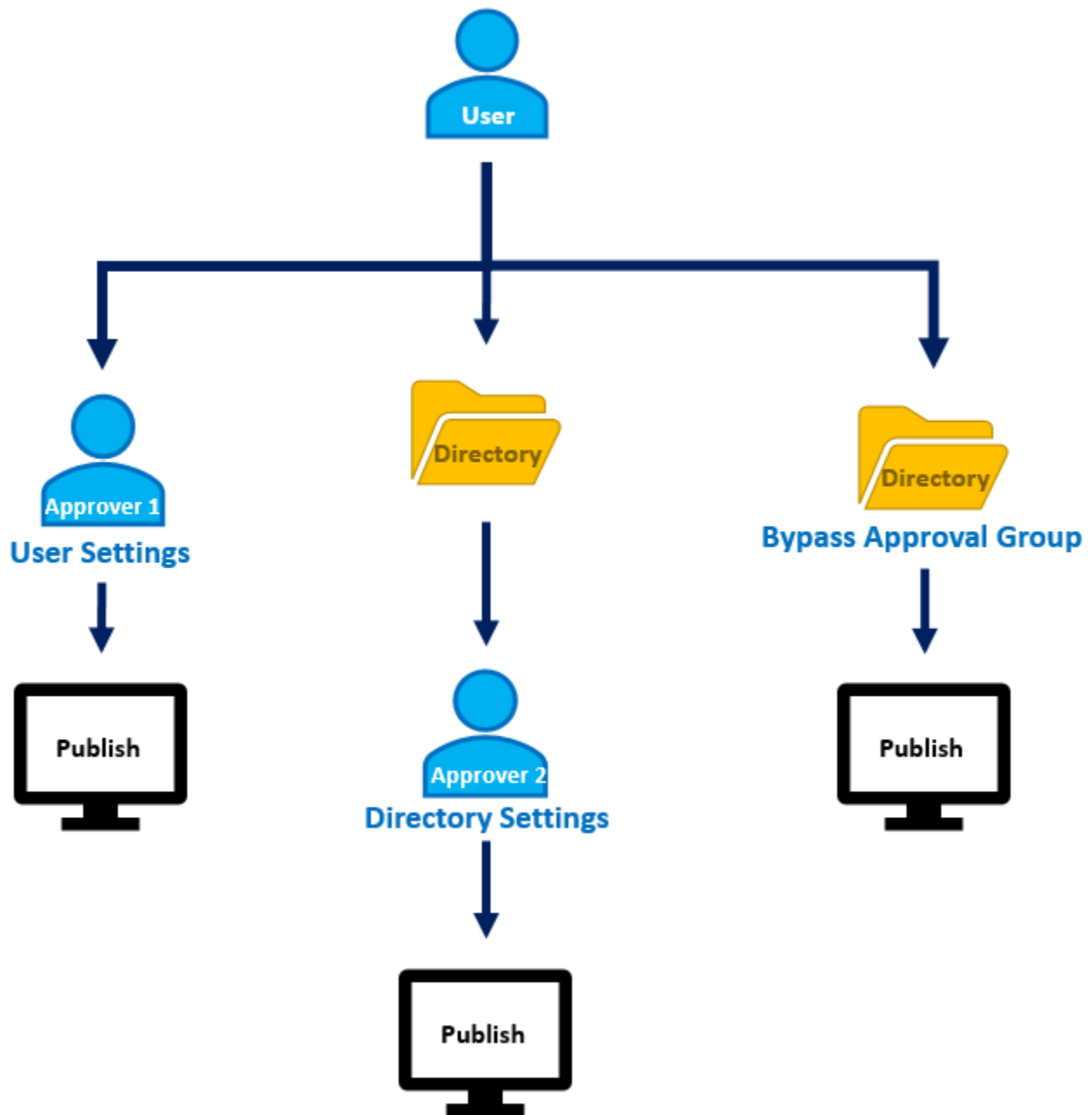
Enforce Approver  Yes  No

**Bypass Approval** groups can also be assigned to sites, directories and pages. When a Bypass Approval group is assigned, members of that group can publish pages immediately, without needing approval. This also overrides settings at the user level.

Bypass Approval

*The selected group can bypass the approval process and publish this page immediately.*

Because of these settings, one user can go through several workflow processes.



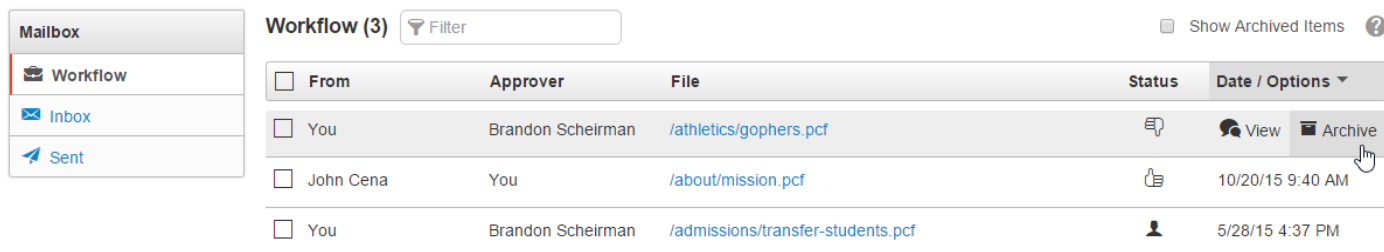
In the first path, the user has an approver specified in their user settings. Normally, pages edited by the user must be sent to that approver for publication.

In the second path, the user is editing pages in a directory that has its own approver assigned. Therefore, those pages must go to the directory approver for publication.

In the third path, the user belongs to the "Bypass Approval Group" of a directory. Thus they can publish pages in that directory without needing approval from any other user.






## Workflow on your Dashboard

The Workflow screen, located under your **Dashboard** menu, is where you can view any workflow processes you are involved in. Each item in the workflow refers to a specific file, and can be expanded to view the actions within that workflow.



From	Approver	File	Status	Date / Options
<input type="checkbox"/> You	Brandon Scheirman	/athletics/gophers.pcf		View  Archive
<input type="checkbox"/> John Cena	You	/about/mission.pcf		10/20/15 9:40 AM
<input type="checkbox"/> You	Brandon Scheirman	/admissions/transfer-students.pcf		5/28/15 4:37 PM

Items show icons displaying their status in the workflow.

Status Icon	Description
	Pending Approval (by another user)
	Pending Approval (by the current user)
	Approved and Published
	Declined
	Cancelled from Workflow

You can also view an item, to see all messages in the workflow and send a new message, and archive an item once the workflow is resolved.

For more information, visit the [Workflow](#) page.