

## 11. Users and Roles

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### Overview

Sitefinity users (also referred to as CMS Users) are users who can conduct content management and/or administrative tasks with a given Web site project. Such users can be managed by any user who is granted the Manage Users permission.

A user role is a group of users associated with a set of user privileges. Roles are an efficient way to manage permissions for groups of users as they classify users with similar characteristics and responsibilities. Roles also determine which portions of CMS a user can view.

There is one role that is automatically created with each new Sitefinity project: the Administrators role. The admin user is assigned to it by default and granted full global, modules and site map permissions.

You cannot:

- restrict the permissions granted to the Administration role
- delete the Administrators role
- delete the last user in the Administrators role.

You can define the set of privileges for each role and assign users to roles. All users assigned to a given role inherit the permissions defined for that role. A user can be assigned zero, one, or many roles.

For example, Josh belongs to the Editors role that allows him to edit pages. However, the administrator decides to allow Josh to edit post comments, too. So, the administrator should choose between:

- creating a new role where this particular permission is allowed and adding Josh to it.
- or
- modifying the Editors role and granting all users assigned to it this additional permission.

At the **Administration > Users** tab, you can:

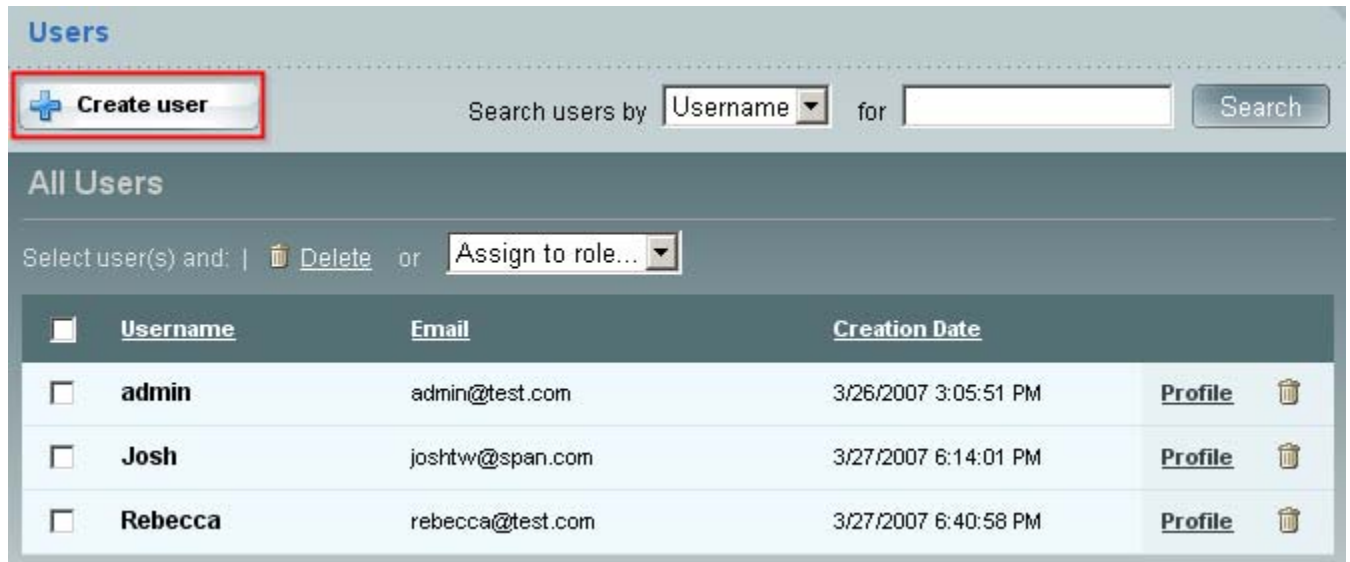
- create roles and user accounts
- modify user profiles
- view and sort users

- delete users and roles
- assign users to roles
- remove users from roles

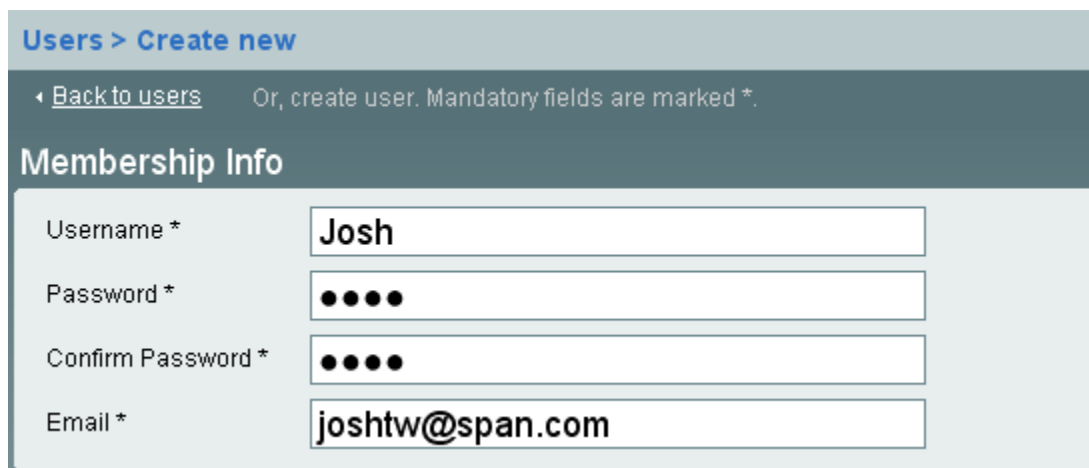
## Creating a User Account

Follow the steps below to create a new user. We assume that the currently logged user belongs to the Administrators role.

1. Go to the **Administration > Users**. You will see a list of all available users.



2. Click **Create user**.
3. A form with the user profile fields opens. All fields in the **Membership Info** section are required.



4. Enter the user details.
5. Assign the user to role(s) by checking the role(s) in the checkbox list. You can also do that later.

6. Click **Create this user**.

### User Details

First name

Last name

### Roles

A role is a group of users associated with a set of user permissions.

Administrators

Editors

or [Cancel](#)

7. The new user is shown in the list:

### Users

[+ Create user](#)      Search users by  for

#### All Users

Select user(s) and: |  or

<input type="checkbox"/>	Username	Email	Creation Date		
<input type="checkbox"/>	admin	admin@test.com	3/26/2007 3:05:51 PM	<a href="#">Profile</a>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Josh	joshtw@span.com	3/27/2007 6:14:01 PM	<a href="#">Profile</a>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Rebecca	rebecca@test.com	3/27/2007 6:40:58 PM	<a href="#">Profile</a>	<input type="button" value="Delete"/>

## Editing User Details

1. Click the **Profile** link in the list of users.

The screenshot shows the 'Users' management interface. At the top, there is a 'Create user' button and a search bar. Below that, there is a section for 'All Users' with options to 'Delete' or 'Assign to role...'. A table lists three users: 'admin', 'Josh', and 'Rebecca'. The 'Profile' link for 'Josh' is highlighted with a red box.

<input type="checkbox"/>	Username	Email	Creation Date		
<input type="checkbox"/>	admin	admin@test.com	3/26/2007 3:05:51 PM	<a href="#">Profile</a>	
<input type="checkbox"/>	Josh	josh@span.com	3/27/2007 6:14:01 PM	<a href="#">Profile</a>	
<input type="checkbox"/>	Rebecca	rebecca@test.com	3/27/2007 6:40:58 PM	<a href="#">Profile</a>	

2. The user profile form opens. Apply your changes. You cannot change the Username and Password. When you are done, click **Save user info**.

The screenshot shows the user profile form for 'Josh'. It is divided into three sections: 'Membership Info', 'User Details', and 'Roles'. The 'Membership Info' section shows 'Username' as 'Josh' (with a note that it cannot be changed) and 'Email' as 'josh@test.com'. The 'User Details' section shows 'First name' as 'Josh' and 'Last name' as 'Turner'. The 'Roles' section has 'Administrators' unchecked and 'Editors' checked. At the bottom, the 'Save user info' button is highlighted with a red box.

**Membership Info**

Username: **Josh**  
The username cannot be changed

Email \*: **josh@test.com**

**User Details**

First name: **Josh**

Last name: **Turner**

**Roles**

A role is a group of users associated with a set of user permissions.

Administrators

Editors

**Save user info** or [Cancel](#)

## Managing Users and Roles

Click a role in the left pane and all users assigned to it will be displayed:

From here, it is most convenient to:

- remove users from the current role;
- delete users;
- assign users to a different role;
- edit user profiles.

Remember that a user cannot do ANYTHING in Sitefinity until he/she is assigned to a role that has been given permissions.

## Deleting a User

To delete a user, click the trashcan icon in the list of users. Any content modifications made by the user, even not yet approved will be saved.

The screenshot shows the 'Users' management interface. At the top, there is a 'Create user' button and a search bar for 'Username'. Below this is the 'All Users' section, which includes a 'Delete' link and an 'Assign to role...' dropdown. A table lists three users: admin, Josh, and Rebecca. The trashcan icon for Rebecca is highlighted with a red box.

<input type="checkbox"/>	Username	Email	Creation Date	Profile	
<input type="checkbox"/>	admin	admin@test.com	3/26/2007 3:05:51 PM	<a href="#">Profile</a>	
<input type="checkbox"/>	Josh	josh@test.com	3/27/2007 6:14:01 PM	<a href="#">Profile</a>	
<input type="checkbox"/>	Rebecca	rebecca@test.com	3/27/2007 6:40:58 PM	<a href="#">Profile</a>	

You can perform group deletion by selecting and clicking the **Delete** link or trashcan icon above the list.

The screenshot shows the 'Users' management interface with the 'Delete' link and checkboxes for Josh and Rebecca highlighted with red boxes.

<input type="checkbox"/>	Username	Email	Creation Date	Profile	
<input type="checkbox"/>	admin	admin@test.com	3/26/2007 3:05:51 PM	<a href="#">Profile</a>	
<input checked="" type="checkbox"/>	Josh	josh@test.com	3/27/2007 6:14:01 PM	<a href="#">Profile</a>	
<input checked="" type="checkbox"/>	Rebecca	reb@test.com	3/28/2007 3:03:26 PM	<a href="#">Profile</a>	

## Changing Current User Details

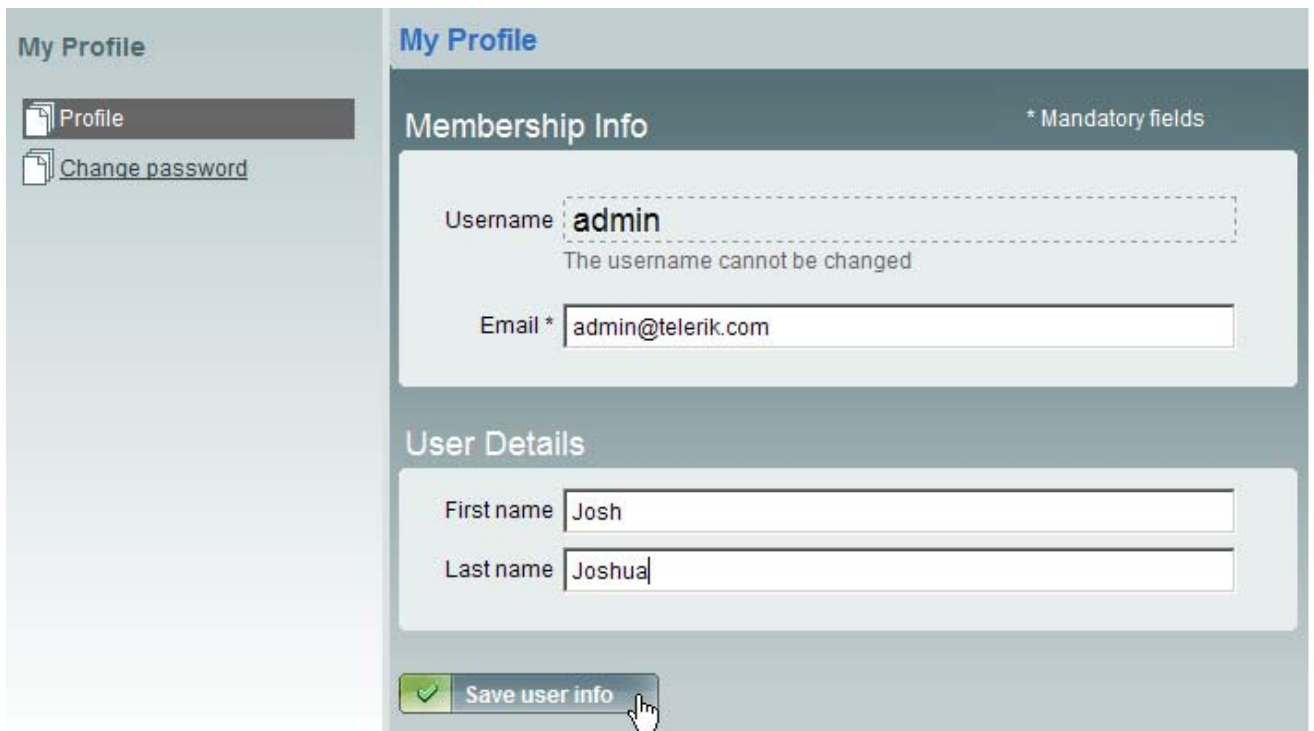
Each Sitefinity user can change their user profile.

To edit your email, first name and last name:

5. Log in Sitefinity.
6. Click **My Profile** in the top right corner of the screen:



7. The user profile form opens. Apply your changes. You cannot change your username.



The screenshot shows the 'My Profile' form. On the left, there is a sidebar with 'Profile' and 'Change password' options. The main form is titled 'My Profile' and contains two sections: 'Membership Info' and 'User Details'. The 'Membership Info' section has a 'Username' field with the value 'admin' and a note 'The username cannot be changed', and an 'Email \*' field with the value 'admin@telerik.com'. The 'User Details' section has 'First name' and 'Last name' fields with values 'Josh' and 'Joshua' respectively. At the bottom, there is a 'Save user info' button with a green checkmark icon.

8. Click **Save user info**.



To change your password:

6. Click the **Change Password** link in the left pane.
7. Enter your old password.
8. Enter your new password.
9. Re-enter your new password.
10. Click **Change password**.

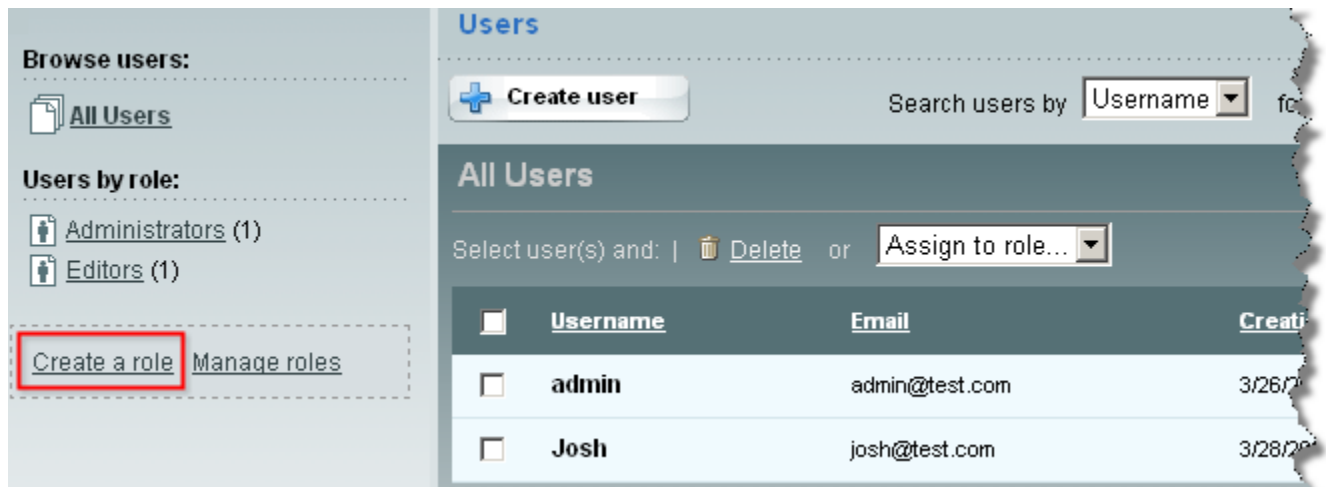


The screenshot displays the 'My Profile' section of a user interface. On the left, a sidebar contains two links: 'Profile' and 'Change password', with the latter highlighted. The main content area is titled 'My Profile' and features a sub-section 'Change your password' with a note '\* Mandatory fields'. This section contains three input fields: 'Password \*', 'New password \*', and 'Confirm new password \*', each filled with masked characters. Below the fields is a 'Change password' button with a green checkmark icon and a mouse cursor pointing to it.

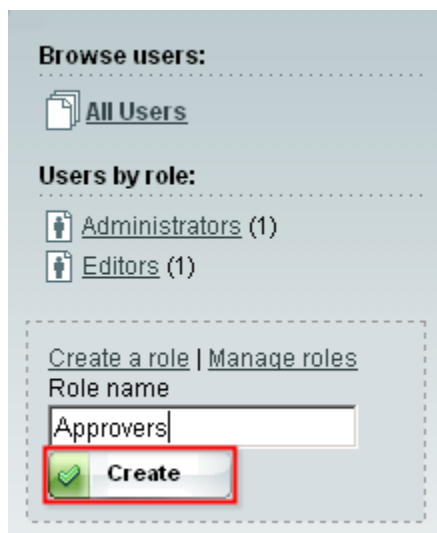
## Creating a Role

Follow the steps below to create a new Sitefinity user role. We assume the currently logged user is assigned to the Administrators role.

1. Click the **Administration** tab.
2. Click the **Create a role** link in the left pane.



3. Type the desired role name:

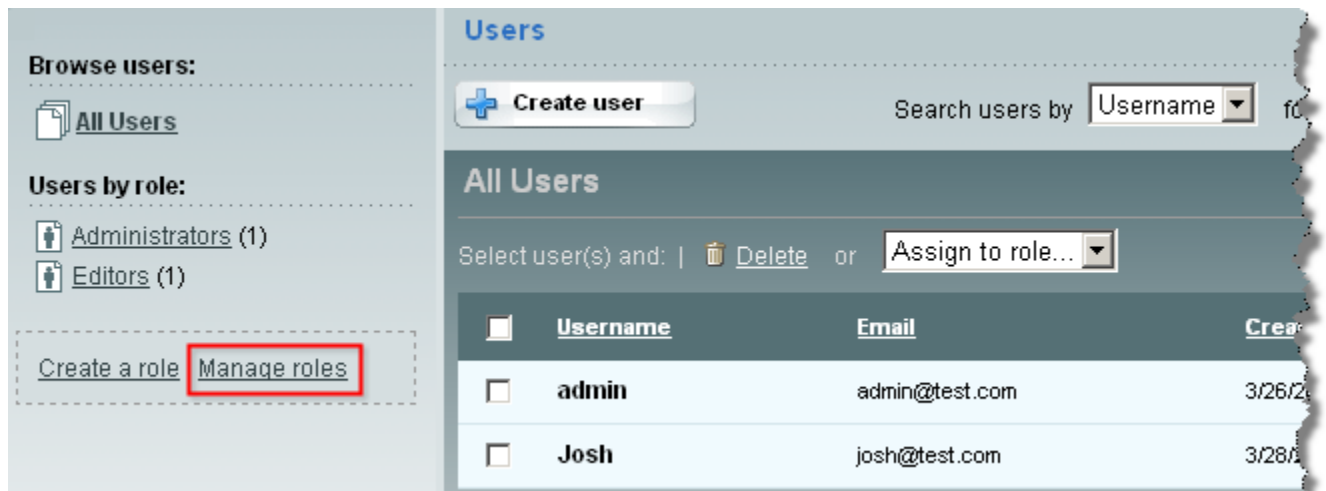


4. Click **Create**.

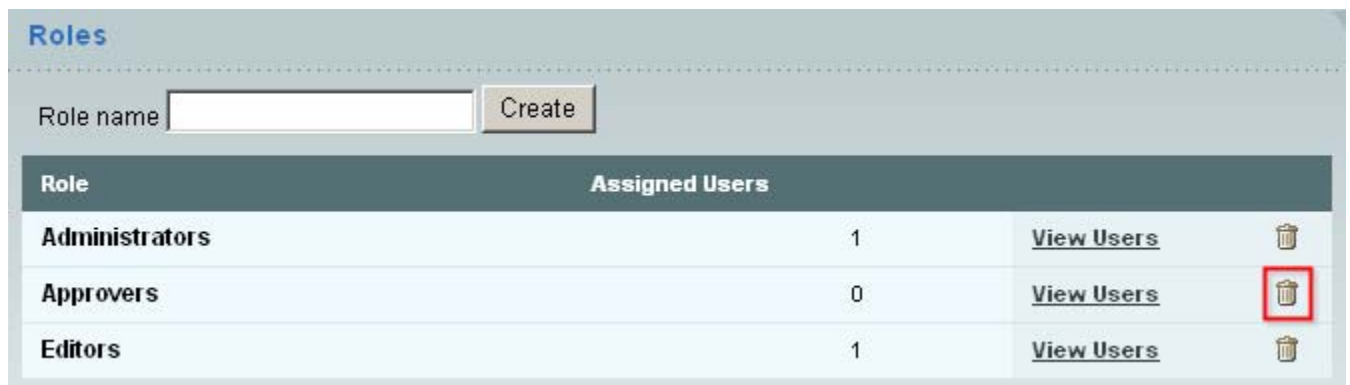
## Deleting a Role

Follow the steps below to delete a user role. We assume the currently logged user is assigned to the Administrators role.

1. Click the **Administration** tab.
2. Click the **Manage roles** link in the left pane.



3. You will see a list of all available roles.
4. Click the trashcan icon next to the role you want to delete.



You cannot delete a role to which there are users assigned. You can use the **View Users** link to temporarily remove users from the role you want to delete.

## 12. Permissions

Permissions are rights that define the type of actions a given user can perform. If a Sitefinity user does not have any permission, they can only navigate through the public part of the site.

There are two explicit permission settings in Sitefinity: Allow and Deny.

There is also an implicit deny setting available: Unset.

- **Deny**  
Denies authorization for the user role to perform the action stated. Deny is the most powerful permission setting in Sitefinity. If a user belongs to a role that has a specific permission set to Deny, that user cannot perform that function, even if he or she belongs to another role that has the same permission set to Allow.
- **Allow**  
Grants authorization for the user role to perform the action stated. Allow is the second-most powerful permission setting in Sitefinity and the one most frequently set.
- **Unset**  
By default, most permissions in Sitefinity are not set to either Deny or Allow. The permissions are left unset, which implicitly denies user roles authorization to perform the action specified. However, because the permission is neither explicitly set to Deny nor explicitly set to Allow, authorization for that permission can be inherited from other roles to which the user is assigned.
- **Inheritance**  
Permissions in Sitefinity are inheritable. This is why if a permission is Unset for a given user in one role and explicitly set for another role the user is assigned to, the user inherits the Allow or Deny for that permission.

When certain permissions are set for the site map, the permissions for the pages are the same (inherited) by default.

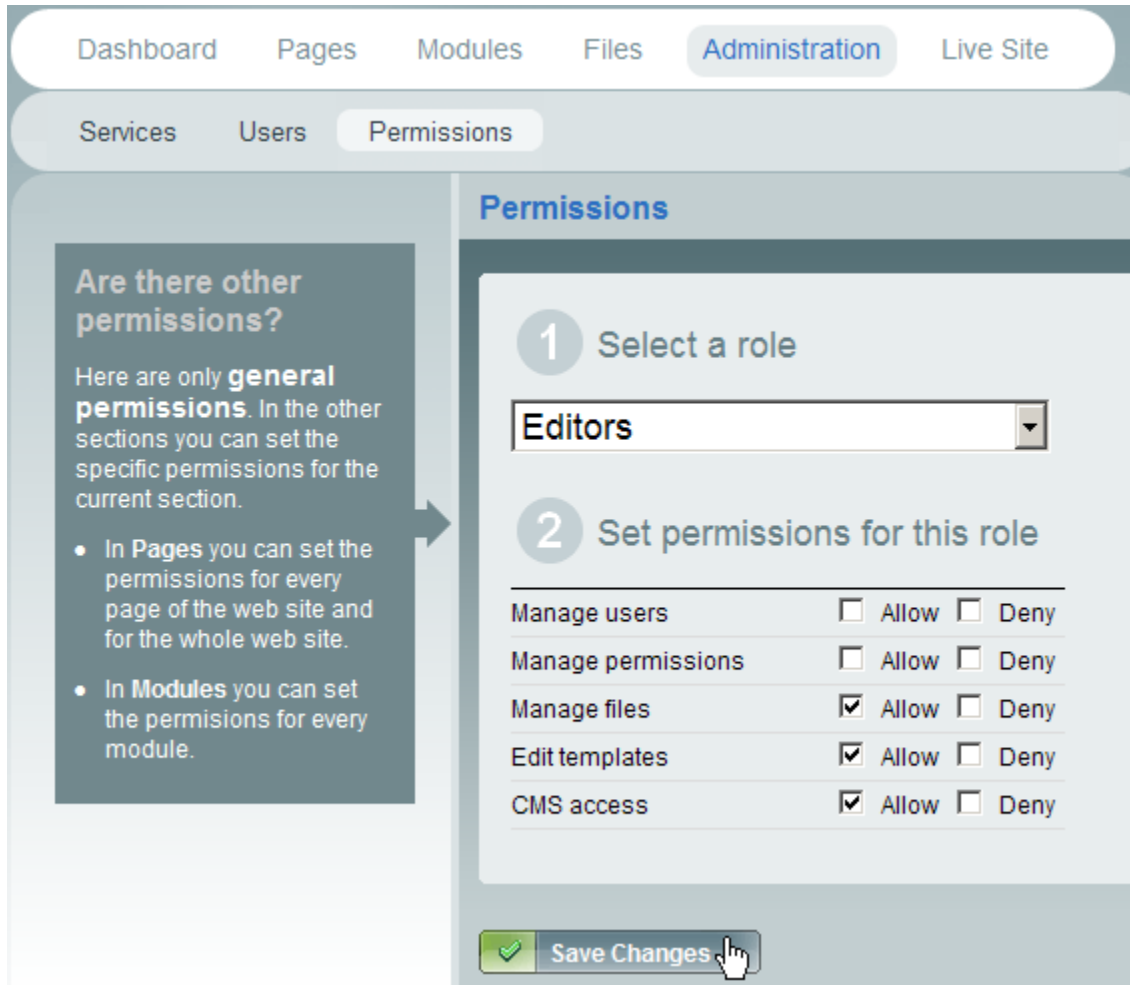
There are several types of permissions:

- **Global Permissions**
- **Module Permissions**
- **Site Map/Pages Permissions**
- **Live Pages Permissions**  
Permissions that apply to the users assigned to a public user role. These permissions are set if a page will be accessible by the members of a public user role or if a secured page will be included in the navigation controls, for example the RadTreeView and RadMenu controls.

Live Pages Permissions would be used to restrict access to a page or branch of pages (e.g. an intranet that would need to be password-protected)

## Global Permissions

These are privileges to manage users, roles, permissions and files. By default there is one administrator user who is granted full global permissions, that is, his permissions are set to “unrestricted”.



The screenshot shows the Sitefinity Administration interface. The top navigation bar includes 'Dashboard', 'Pages', 'Modules', 'Files', 'Administration' (selected), and 'Live Site'. Below this, there are sub-tabs for 'Services', 'Users', and 'Permissions'. The main content area is titled 'Permissions' and is divided into two numbered steps:

- 1 Select a role**: A dropdown menu is set to 'Editors'.
- 2 Set permissions for this role**: A table of permissions with checkboxes for 'Allow' and 'Deny':
 

Manage users	<input type="checkbox"/>	Allow	<input type="checkbox"/>	Deny
Manage permissions	<input type="checkbox"/>	Allow	<input type="checkbox"/>	Deny
Manage files	<input checked="" type="checkbox"/>	Allow	<input type="checkbox"/>	Deny
Edit templates	<input checked="" type="checkbox"/>	Allow	<input type="checkbox"/>	Deny
CMS access	<input checked="" type="checkbox"/>	Allow	<input type="checkbox"/>	Deny

At the bottom of the main content area, there is a 'Save Changes' button with a green checkmark icon.

The sidebar on the left contains a help box titled 'Are there other permissions?' with the following text:

Here are only **general permissions**. In the other sections you can set the specific permissions for the current section.

- In **Pages** you can set the permissions for every page of the web site and for the whole web site.
- In **Modules** you can set the permissions for every module.

- 1. Manage users** allows you to:
  - view the Administration > Users tab
  - create user accounts
  - edit user details
  - assign users to roles
  - remove users from roles
  - delete users
  - create user roles
  - delete roles with no users in them
- 2. Manage permissions** allows you to:
  - view the Administration > Permissions tab
  - manage global, modules, site map and pages permissions.

3. **Manage files** allows you to:
  - view the **Files** tab
  - upload, copy, move, rename and delete files/folders.
4. **Edit templates** allows you to:
  - view the Templates tab
  - upload master pages, duplicate, delete, rename and edit templates.
5. **CMS access** allows you to access the Sitefinity backend

## Module Permissions

These allow the site administrators to control the management of third party controls that support this functionality. These permissions apply to all content items and not to a single item as in pages.

To set the permissions for a whole module, go to the respective module tab and click the **Permissions** link in the left pane. Select a role in the dropdown list and define the permissions for the users assigned to it.

The screenshot shows the Sitefinity administration interface for 'MyOrganization'. The 'Modules' tab is selected, and the 'Generic Content' sub-tab is active. The left sidebar contains three sections: 'Content Items', 'Permissions', and 'Comments'. The main content area is titled 'Generic Content' and 'Set permissions for Generic Content'. It features a two-step process: 1. 'Select a role' with a dropdown menu currently showing 'Content Contributors'. 2. 'Set permissions for this role' with a table of permissions for 'View', 'Create', 'Modify', 'Delete', and 'Change Permissions', each with 'Allow' and 'Deny' checkboxes. A dashed box contains the instruction 'Save before selecting another role!'. At the bottom, there is a 'Save Permissions' button with a green checkmark icon.

Permission	Allow	Deny
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Modify	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Change Permissions	<input type="checkbox"/>	<input type="checkbox"/>

1. **View** allows you to see the module tab and all content items.
2. **Create** allows you to add new content items and edit your own items.
3. **Modify** allows you to edit content items created by other users.
4. **Delete** allows you to remove content items.
5. **Change Permissions** allows you to set the user permissions for the whole module.



## Site Map Permissions

Permissions granted to control the management of the whole Web site content. These permissions are inherited as page permissions by default.

To set the permissions for all the pages, go to the Pages > Site Map tab. Select All Pages and click the Permissions tab on the right. Select a role in the dropdown list and define the permissions for the users assigned to it.



1. **View** allows you to view draft and published pages. This permission should always be set to Allow.
2. **Create** allows you to create new pages.
3. **Modify** allows you to edit pages, but not page properties.
4. **Delete** allows you to delete pages.
5. **ChangePermissions** allows you to manage user permissions.

6. **ChangeProperties** allows you to edit page properties.
7. **Approve** allows you to approve or decline page modifications.
8. **Publish** allows you to publish pages.
9. **ModifyLayout** allows you to change page Template and Theme. **Modify** must also be granted.

## Page Permissions

Permissions given for a page to control the management of the page content and controls content. All permissions set for the site map are inherited as page permissions. To change this, click the **Break inheritance** link.

To set the permissions for a page, go to the **Pages > Site Map** tab. Select the page in the site map and click the **Permissions** tab on the right. Select a role in the dropdown list and define the permissions for the users assigned to it.

Set permissions

**This page inherits permissions from its parent.**  
 Inherited values are disabled. [Break inheritance](#)

**1 Select a role**

▼

**2 Set permissions for this role**

View	<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny
Create	<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny
Modify	<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny
Delete	<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny
ChangePermissions	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny
ChangeProperties	<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny
Approve	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny
Publish	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny
ModifyLayout	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny

✔ **Save Changes**

1. **View** allows you to view draft and published pages. This permission should always be set to Allow.
2. **Create** allows you to create new pages.

3. **Modify** allows you to edit pages, but not page properties.
4. **Delete** allows you to delete pages.
5. **ChangePermissions** allows you to change rights granted to users.
6. **ChangeProperties** allows you to edit page properties.
7. **Approve** allows you to approve or decline page modifications.
8. **Publish** allows you to publish pages.
9. **ModifyLayout** allows you to change page Template and Theme. **Modify** must also be granted.

If you want to secure a page and restrict the access to it, you can use the Anonymous access property:

1. Go to **Pages > Site Map**.
2. Click to select the page in the site map.
3. Click the **Properties** tab.
4. In the More Options section, find Anonymous access.
5. Select **Deny** to restrict anonymous user access to the page and require authentication.
6. Set the **View** page permission for the role whose access you want to restrict.