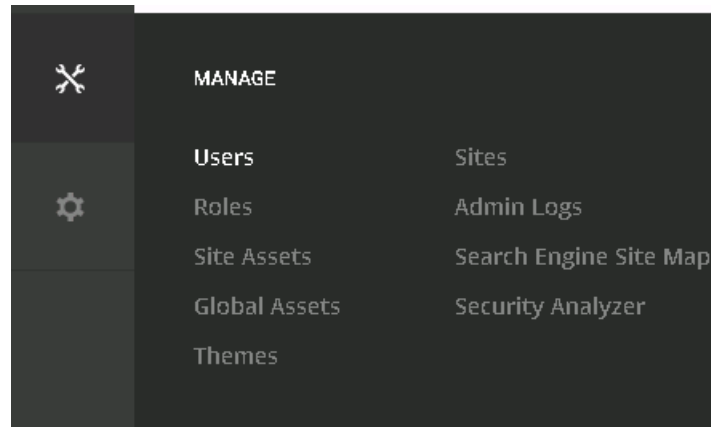DNN 9 Admin Guide with Screen Shots

Adding User –

- Click on Manage Icon (two wrenches on menu bar)

- Users
  - o Click Add User
  - o Fill in the required fields listed below:
    - First Name – Enter First Name
    - Last Name – Enter Last Name
    - User Name – Enter the User Name to be used by the employee
    - Email Address – Enter the employees email address
    - Authorized – Leave ON selected unless this user should not be authorized to log into Employee Self Service at this time
    - Random Password – defaulted to Off, turn on if a randomly generated password should be emailed to the employee, the password menu options will disappear once this has been selected
    - Password – Type in Password for employee, this can be a generic password to be used the first time and then the employee can be forced to change it on first log on
    - Confirm Password – reenter the password to confirm
    - Send An Email to New User – check if an email should be sent to the new user notifying them of

Users

Add User

Show: Authorized ▾   Search Users 🔍

NAME	EMAIL	JOINED
-	-	-

First Name: ⓘ
Doris

Last Name: ⓘ
Ajar

User Name: ⓘ
dajar

Email Address: ⓘ
melissa.landon@tylertech.com

Authorized: On ⬤

Random Password: Off ⬤

Password: ⓘ
••••••

Confirm Password: ⓘ
••••••

☐ Send An Email To New User.

Cancel   Save

Rita Book
rbook

melissa.landon@tyler...   06/21/2018   🛡 ⚙ 👤 ⋯

Edit User

- Click on Manage
- Users
- All users will be shown in the grid – on the right-hand side of each user are 4 menu item options – Click the applicable menu item
- Account Data – displays data for employee
  - Locked out – click on unlock user menu icon to unlock the user
- Shield – Roles – Add or Edit user Roles
  - Send Email - check if an automatic email should be sent to the employee notifying them that they have been given access to the role
  - Type in user role – begin typing to add a role to this user – once you begin typing the user roles will auto fill, click in the box the correct role to add, then click the +ADD to add this role to the user
  - Delete a role – click on the role listed below the employee on the right-hand side is a X to delete the role
  - Start/End Date for User Role – click on the User Role on the right-hand side, the Check box is the Start date and the X is the End date – once they have been clicked on a calendar will appear to choose the date

Doris Ajar
dajar

melissa.landon@tyler...   08/13/2018

ROLES

☑ Send Email   Begin typing to add a role to this user.   ✚ Add

ROLE	START	EXPIRES			
Registered Users	-	-			
Subscribers	-	-			
Employees	-	-	☑	☒	✕

- Cog Wheel – Account Settings
  - User Name – Change if applicable
  - Display Name – Change if applicable
  - Email Address – Change if applicable
  - Change Password – Click to show the Change Password menu
    - Enter the new password and the confirm password
    - Click Apply to save the changes
  - Force Password Change – Click to force the employee to change their password on the next log in
  - Send Password Reset Link – Click to have an automatic email password reset link to be sent to the employee
  - Unlock User – Click to unlock the user

Users

Add User

Show: Authorized

Search Users

NAME	EMAIL	JOINED
Doris Ajar dajar	melissa.landon@tyler…	08/13/2018

ACCOUNT SETTINGS

User Name:

dajar

Display Name:

Doris Ajar

Email Address:

melissa.landon@tylertech.com

PASSWORD MANAGEMENT

[Change Password]

[Force Password Change]

[Send Password Reset Link]

ACCOUNT DATA

Created Date:	August 13, 2018 6:07 AM
Last Login Date:	August 13, 2018 7:07 AM
Last Activity Date:	August 13, 2018 7:09 AM
Last Password Change:	August 13, 2018 7:07 AM
Last Lock-Out Date:	Never
User Is Online:	False
Locked Out:	False
Authorized:	True
Update Password:	False
Deleted:	False
User Folder:	223/15/2015/

Cancel   Save

- Person – Additional items per user – Can be filled out by employee and does not reflect back to IVEE – Employee Maintenance
  - Basic – Shows name, picture, and a biography
  - Contact – Additional contact information employee can fill out, phone, fax, website, etc.
  - Location – Additional location information per employee
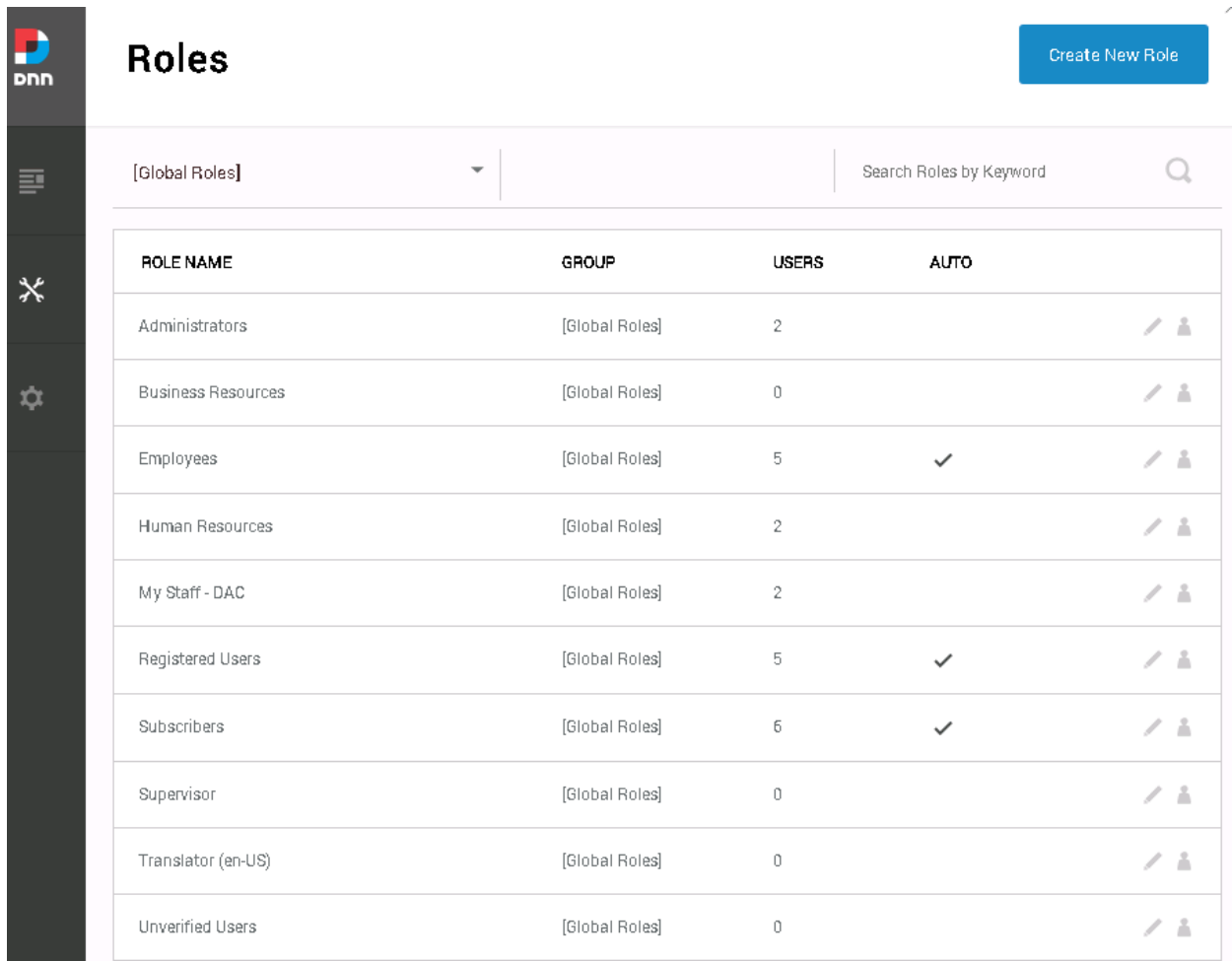 - Click Update to save any changes

- Ellipse (three dots) – Quick Links to User Management
  - View Profile – view employee profile – employee maintained
  - Change Password – Shows password change screen
  - Force Password Change – Force User to change password on next log in
  - Send Password Reset Link – Send password reset link email to employee
  - Un-Authorize User - Un-Authorize user so they can no longer log in
  - Delete User – Delete User from Employee Self Service
  - Make Super User – Make this user a super user

Security Role

- Click on Manage Icon
- Roles – Edit or Add a new Security Role
    - Grid shows the number of users assigned and shows if the role should be automatically assigned
    - Security Role can be Edited by Clicking the Edit Role Icon (pencil)
        - Role Name and Description can be edited if applicable
        - Role Group – filters security role when adding employees
        - Auto Assignment – turn on (blue) if this role should be auto assigned to every user who is added
        - Assign to Existing Users – if a role should be auto assigned to all existing employees turn on (make blue)
        - Public – should this role be public if so turn to blue
        - Click Save to save any changes
        - Delete will delete this role

Roles

Create New Role

[Global Roles] ▾ | Search Roles by Keyword 🔍

ROLE NAME	GROUP	USERS	AUTO		
Administrators	[Global Roles]	2		✎	👤
Business Resources	[Global Roles]	0		✎	👤
Employees	[Global Roles]	5	✓	✎	👤
Human Resources	[Global Roles]	2		✎	👤
My Staff - DAC	[Global Roles]	2		✎	👤
Registered Users	[Global Roles]	5	✓	✎	👤
Subscribers	[Global Roles]	6	✓	✎	👤
Supervisor	[Global Roles]	0		✎	👤
Translator (en-US)	[Global Roles]	0		✎	👤
Unverified Users	[Global Roles]	0		✎	👤

- Add a Security Role
  - Click the Create New Role icon
  - Enter the Role Name and Description
  - Choose applicable options and click Save

Page Management

Adding a Page

- Click the Content Menu Item – Pages (icon with lines/box, top item)
    - Pages show on the left-hand side in order they appear left to right on the menu
    - Click on the Page to display the menu options and choose the applicable item
    - Once the page is clicked the child pages will show next to the parent page
        - View – (Eye) Click to View the setup of the page – no additional menu items will show
        - Edit (Pencil) – click this to edit the page, additional menu options will show as applicable to per each module or child page
        - Settings (Cog Wheel) -
        - Delete (X) – Click to delete the page
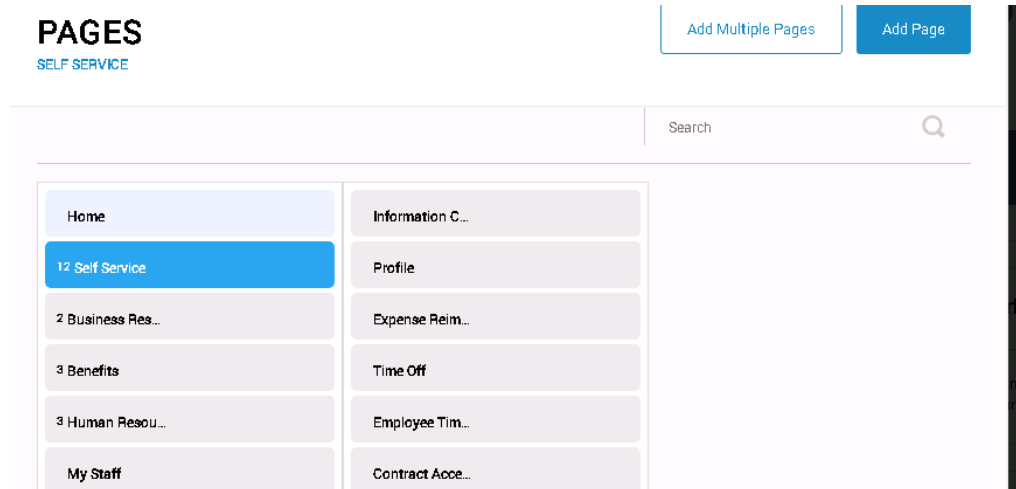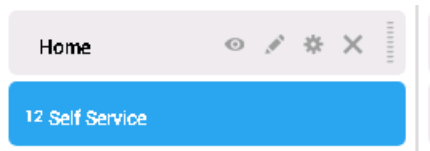
Page Settings –

- o Details
  - Page Type – Choose the applicable page type
    - Standard
    - Existing
    - URL
    - File
  - Name – enter Name of page
  - Title – enter Title of page – typically the same as the Name
  - Description – Enter a brief description of the page – this is informational for any Admin users
  - Keywords – enter any keywords – not required
  - Tags – enter any applicable tags – not required
  - Parent Page – if this is a child page – chose the Parent Page to display this under
  - Display in Menu – Leave On unless this page is no longer needed, its best to choose not to display a page instead of deleting it
  - Enable Scheduling – Turn on if applicable
  - Duplicate Page – Icon at top of page – click if desired to "copy" this page and make changes
  - Save as Template – icon at top of page -

- o Permissions
  - Permissions by Role
    - Choose Role and click +Add to add this role to the page – settings will display based on Parent Page
    - View - check the box to allow View only access to the page
    - Edit – check the box to allow Edit access to this page – any user that has this security role
    - Delete – trash can – click to remove this roles access from this page
    - Save any applicable changes, otherwise choose Cancel
  - Permissions by User
    - Choose Employee and click +Add to give a single user access to a page, instead of the whole security role
    - View - check the box to allow View only access to the page
    - Edit – check the box to allow Edit access to this page
    - Delete – trash can – click to remove this users access from this page – only if already setup
    - Save any changes
  - Modules – all modules on this page will show
    - Edit – click to edit the Module (more menu items may show on screen that are not listed below, this covers the main items needed, any additional items will need to be reviewed/added with Support Assistance)

o Module Settings
  ▪ Basic Settings
    • Module – shows the module name
    • Module Title – shows name of module – can be Changed

  ▪ Permissions – shows permissions to Security Role
    • Security Role added to module – View and/or Edit mode assigned
    • Inherit View permissions from Page – checked if the View permissions should flow from Parent Page

- Page Settings – Includes some of the following: Alignment, Cache Settings, and Advanced Settings (where Parent page is listed)

- Optional additional tab based on Module – Name will be different based on module
    - ***Choose IVEE Connection Group if applicable, will need to be changed each year to point to correct fiscal year***

- Delete – trash can – click to remove the module form the page

Editing a Page

- Click the Content Menu Item – Pages (icon with lines/box, top item)
  - Pages show on the left-hand side in order they appear left to right on the menu
  - Click on the Page to display the menu options and choose the applicable item
  - Change any applicable settings – settings are in detailed above in the Add Page section

Add a Module – open the page the module should be added to and ensure it is in Edit mode – use the bar at the bottom and choose the correct menu item. The Page/Module settings in Edit mode will show if the Edit (Pencil in bottom left hand corner) is selected. When a module is clicked on the additional menu items will show, the Edit, Settings, and Moving icons will appear.

✎ My Staff Information - by Supervisor

- Add Module – Box icon
  - Choose the applicable Module (use the scroll bar to view all modules) in the grid or use the Search menu to narrow down the modules
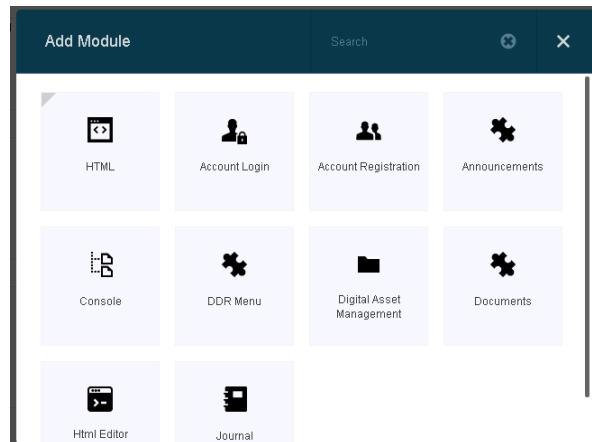
- Add Existing Module – Box with and E icon
  - Choose Page from drop down box – once this is chosen the modules will show in the grid
  - Select the module and place it on the page in the correct location
  - This makes a duplicate of the module to be edited
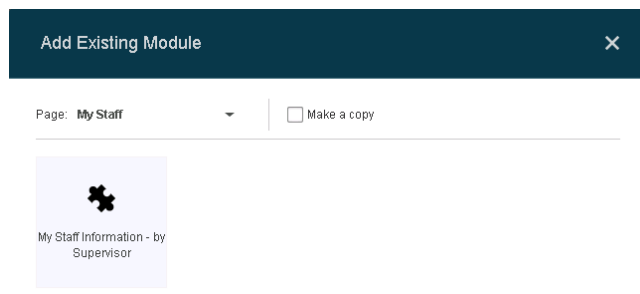
- Page Settings – Cog Wheel
    - Shows Page Settings menu – explained above

DNN9 Add documents to Document Center:

- Select the page to add the Documents Module to.
- Then Click the Edit icon (Pencil in bottom left hand corner).
- Click the Add Module (box icon) on the bottom menu bar.
- Once the Document module is added to the page hover over the top dotted line until the menu items show, Click the Edit Icon (Pencil), Choose Add new Document
- Fill in the Following Information
    - Title – enter the title of the document
    - Description – enter the Description of the document, usually the same as the Title
    - Category – type in a category – this is used to categorize the documents in the module if applicable
    - Link
        - Link Type – choose None, URL, or File
        - File Location – Choose Applicable – leave Root if unknown
        - File Name – this auto fills when the file is chosen – make sure this is the file name that is to be uploaded
        - Upload New File – click if choosing a file – browse and select the file to be attached – Only Shows if File is selected
            - Select Choose File – browse to the file
            - Upload Selected File – click once the file shows
            - Select an Existing File – only choose if file is already on the site and change be chosen in the drop down box
        - Location – Enter the URL to be clicked on
        - Select Existing URL will autofill with one already setup – do not click unless it is being duplicated
        - Track number of Time This Link is Clicked – check to track
        - Log the User, Date, and Time for Every Link Click – check to track
        - Open Link New Browser Window – highly recommended, if a URL is entered it will open in a new window
        - Sort Index – another way to sort
        - Force Download – Check if the download must occur
        - Click Update to Save the Document
        - Continue to add any documents
        - Screen Shots below

Edit Documents

Indicates required fields

Title: * ⓘ   [Health Insurance Premium List]

Description: ⓘ   [Health Insurance Premium List]

Category: ⓘ   [Health Insurance]

Owner: ⓘ   SuperUser Account [Change Owner]

Link: ⓘ

    Link Type:
    ○ None
    ○ URL (a Link to an External Resource)
    ● File (A File on Your Site)

    File Location:
    [Root ▾]

    File Name:
    [EE Cap Amount Import.xls ▾]

    [Upload New File]

    ☐ Track Number of Times This Link Is Clicked
    ☐ Log the User, Date, and Time for Every Link Click
    ☐ Open Link in New Browser Window
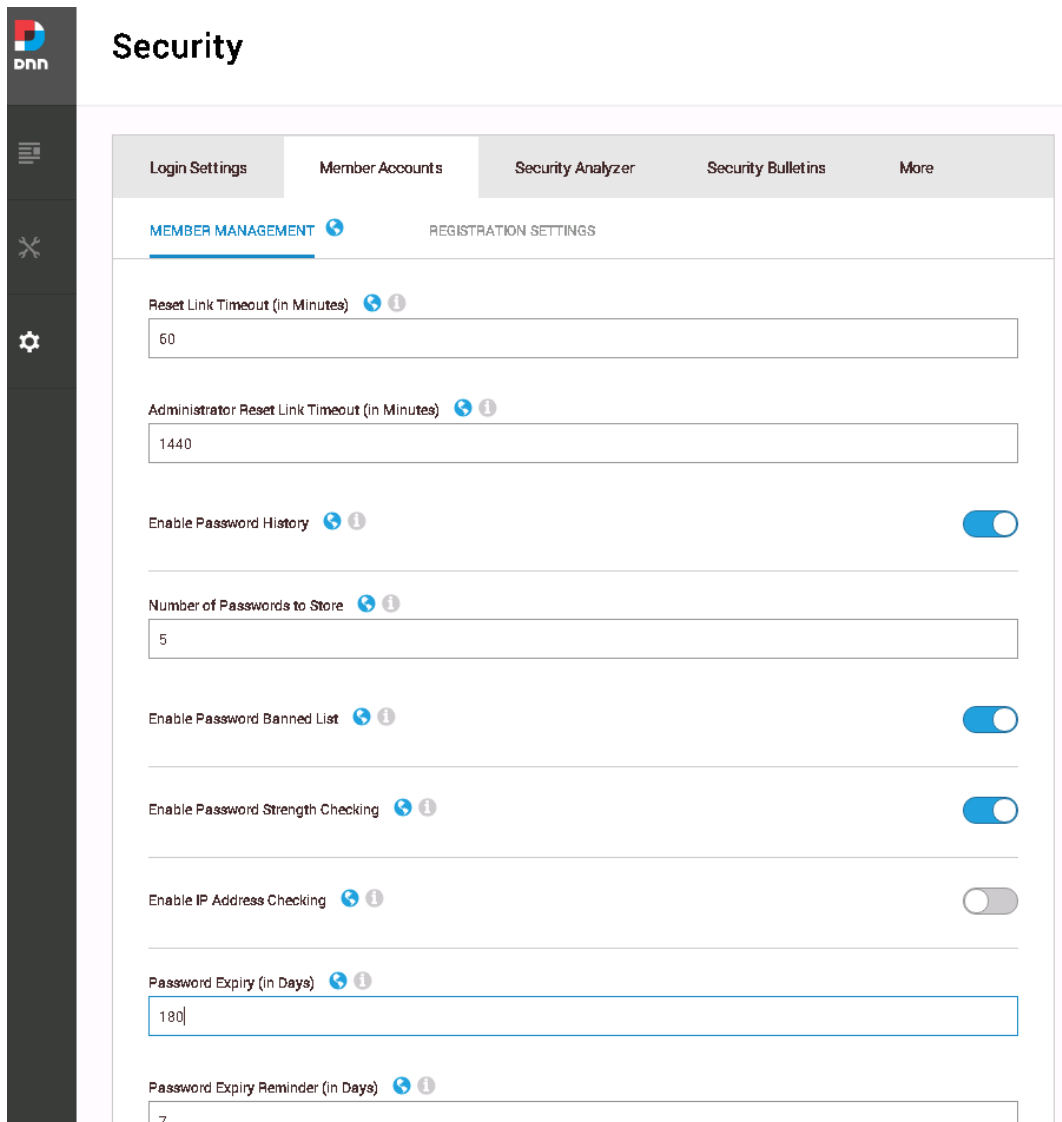
Sort Index: ⓘ   [|]

Force Download? ⓘ   ☐

[**Update**]   [Cancel]

Documents

	Title	Owner	Category	Modified Date	Size	
📝	Health Insurance Premium List	SuperUser Account	Health Insurance	8/13/2018	25.38 KB	Download

Site Settings

Force Password Expiration for Employees – force employees to change their password within a specific number of days

- Settings | Security | Member Accounts
- Password Expiry (In Days) – enter the number of days to force a user to expire the password
- Reset Link Timeout (in Minutes) – enter number of minutes to reset the link timeout
- Enter the number of day and click Save

Security

Login Settings	Member Accounts	Security Analyzer	Security Bulletins	More

MEMBER MANAGEMENT   REGISTRATION SETTINGS

Reset Link Timeout (in Minutes)
60

Administrator Reset Link Timeout (in Minutes)
1440

Enable Password History

Number of Passwords to Store
5

Enable Password Banned List

Enable Password Strength Checking

Enable IP Address Checking

Password Expiry (in Days)
180

Password Expiry Reminder (in Days)
7