Extranet - User Guide

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C1 CMS

Contents

C1 CMS

1   Introduction

An extranet is a private network that uses the Internet to securely share a company's internal information or resources with its customers, partners and other users. It is an effective way of doing business with a selected set of other companies without exposing private or sensitive information to general public access.

The **Extranet** add-on securely protects your websites that run on C1 CMS by allowing only registered users to view your website's content and access its resources such as media files not available to the general public.

The user-friendly administrative tools for managing users, groups and security are directly integrated into the CMS Console.
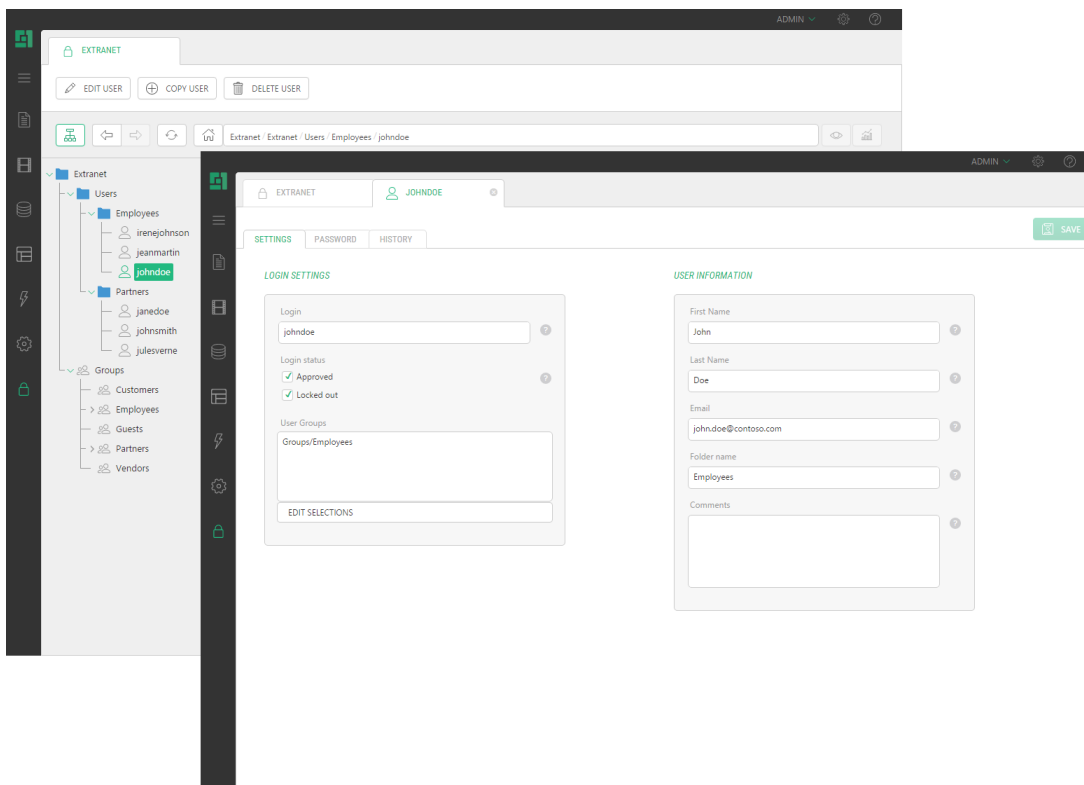

Figure 1: Extranet

If you want your website visitors to log on to, and log off from your website, you can easily add these possibilities to your website using a number of Razor-based and easy-to-redesign functions.

It is also possible to provide a public registration on your website via the signup form available in the add-on. Besides, you can allow your registered users to manage their passwords if they forget or want to change them.

1.1   Who Should Read This Guide?

This guide is aimed at website administrators who will manage access to websites, web pages and other online resources.

We assume that you know how to work with the Content and Layout perspectives of C1 CMS. We also assume that you have an idea of what extranet is.

As a website administrator, you will primarily work within the Extranet perspective, a new perspective that appears in the Navigation pane once the add-on is installed.

To add the Registration and Login Status forms to your website, you will also need to know how to add functions to web pages and templates and have access to the Content and Layout perspectives to modify web pages and templates.

1.2   Getting Started

To get started with the Extranet add-on, you are supposed to take a number of steps.

Getting Started		
Step	**Activity**	**Chapter or section**
1	Install the Extranet add-on.	
3	Create users	*Creating and Managing Users*
3	Create groups	*Creating and Managing Groups*
4	Assign users to groups	*Assigning Users to Groups*
5	Set up the login page	*Setting Up Login Page*
6	Set up the login status on pages	*Setting Up Login Status on Existing Pages*
7	Activate the extranet security on the website	*Activating Extranet Security*
8	Protect websites, web pages, media files	*Protecting Web Pages* *Protecting Entire Websites* *Protecting Media Files*

In the following few chapters, you will learn more about these and other activities.

1.3   Terms and Abbreviations

The following is the list of terms and their definitions used throughout this guide.

Terms and Definitions	
Term	**Definition**
Extranet	A private network that uses the Internet to securely share a company's internal information or resources with its external users.
Extranet user	A person who uses extranet and has an extranet account. Identified by a user name and authenticated with a password.
User group	A group of extranet users who have the same permissions within the extranet.
Extranet security	Protection of website resources such as pages and media files with extranet facilities from non-authorized access.
Login page	A dedicated page on a website where extranet users can log in to the extranet and, as a result, access extranet-protected resources.
Login status	Indication of whether the current user is logged in to the extranet and, if so, what user account is used.

C1 CMS

1.4 Important Notes

- The e-mail functionality of the Extranet add-on uses an SMTP Server on the local host (server) by default. You can change this behavior by editing *~/web.config* and include the */configuration/system.net/mailSettings* section. For information about configuring the e-mail host in *web.config*, please refer to http://docs.c1.orckestra.com/ConfiguringEmailHost

C1 CMS

2   Creating and Managing Users and Groups

Before you start protecting web pages and other resources of your website, you should define who can access them.

First, you should add users to your extranet. Then, you need to create extranet groups. Finally, you have to assign the users to the groups.

In the following few sections, we will cover all these steps in more detail.

2.1   Creating and Managing Users

Each approved extranet user will be able to access all the pages and media files on your website after having logged in successfully.

You create an extranet user account by specifying the user's credentials, name, and, optionally, email address as well as indicating whether this user will be immediately approved to access the extranet.

To create an extranet user account:

1.   In the **Extranet** perspective, expand **Extranet**.

2.   Select **Users** and click **Add User** on the toolbar.

3.   Fill out the fields in the **Add Extranet User** dialog providing the login and user information:

▪   **Login**: The name the user should specify when logging in. Required.

▪   **Password**: The password the user should specify when logging in. Required.

▪   **Retype password**: The password repeated. Required.

▪   **Login status**: The option that indicates whether the user is approved for logging in. Selecting this option will give the user access to your extranet immediately. This is a default value. You can also choose to approve the user later.

▪   **Name**: The first and last names of the user. Required.

▪   **Email**: The email address of the user. It can be used for sending the password to the user if forgotten.

▪   **Folder**: The folder under **Users** where this user will be found. It is used for grouping users by a certain criterion (for example, all your customers) and helps quickly find a user. If the folder you have specified does not exist, it will be created automatically.

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Figure 2: Creating an extranet user

4. Click **OK**. A new user account has been added to your extranet.

You can create as many user accounts as you need.

Once you have created all user accounts, go on to create user groups.

Extranet - User Guide

2.1.1   Editing User

If you want to change the extranet user's password or approved status, you should edit this user's account settings.

In addition to the properties you have set up when you created a user account, you can set up other properties such as the user's locked-out status and groups the user belongs to.

To edit an existing user account:

1. In the **Extranet** perspective, locate and click the user account you want to change settings for and click **Edit User** on the toolbar. The user account settings form opens in the right pane.

2. On the **Settings** tab, change the settings where necessary. Most settings are familiar to you from the steps of creating a user. Additionally, you can set up the following properties:

   ▪ **Locked out**: This option indicates whether the user has been locked out.

   ▪ **User Groups**: In this list you specify which groups the user belongs to. You can edit the list by clicking **Edit Selections** and selecting the groups in the **User Group** dialog.

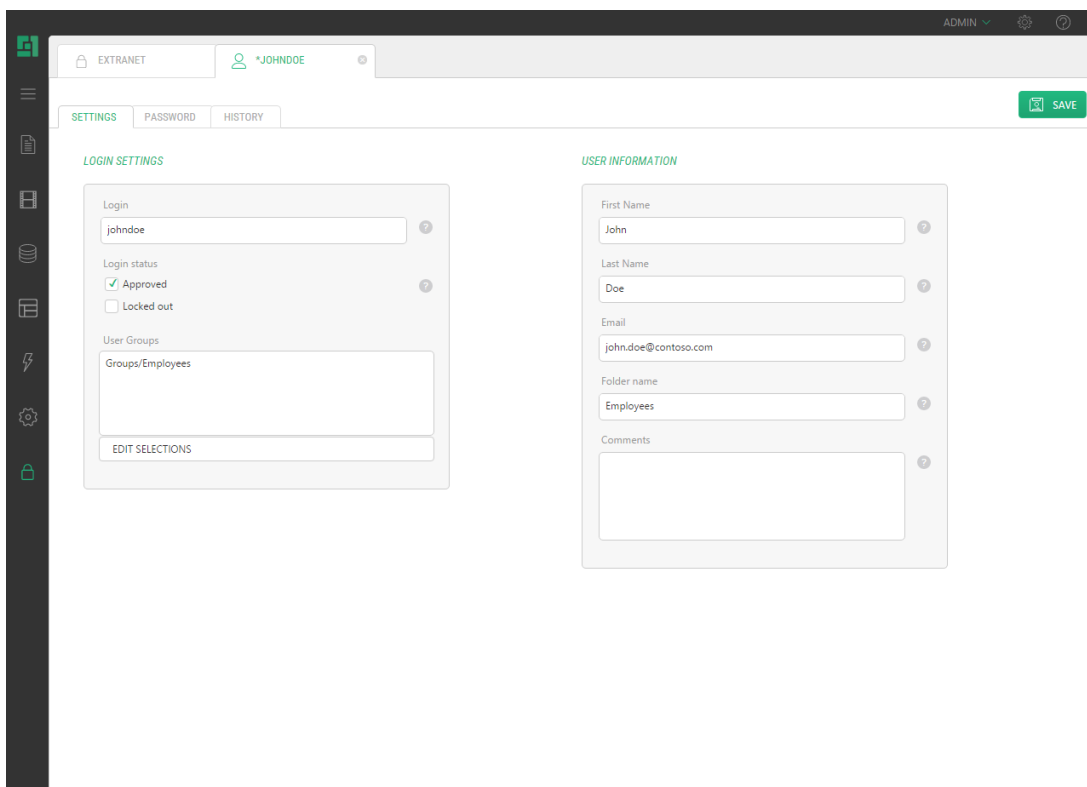   ▪ **Comments**: Additional information about the user.

Figure 3: Editing an extranet user

3. On the **Password** tab, change the password if necessary.

4. Click **Save**.

2.1.2 Viewing User History

The Extranet add-on keeps track of user account activities such as the date and time of the last user's login to your extranet or the date and time of the user's last activity.

To view an existing user's history information:

1. In the **Extranet** perspective, locate and click the user account you want to change settings for and click **Edit User** on the toolbar. The user account settings form opens in the right pane.

2. Click the **History** tab and view the history information related to this user account:

- **Created**: The date and time when this user account was created

- **Last login**: The date and time of the user's last login to the extranet

- **Last password change**: The date and time of the last change of the user's password

- **Last locked out**: The date and time of the user account's last lockout

- **Last activity**: The date and time of the user's last activity within the extranet

SETTINGS   PASSWORD   **HISTORY**

USER ACTIVITY HISTORY

Created

2015-11-10T14:11:52.8730903+02:00   ?

Last login

2015-11-10T14:11:52.8730903+02:00   ?

Last password change

2015-11-10T14:11:52.8887163+02:00   ?

Last locked out

2015-11-10T14:11:52.8730903+02:00   ?

Last activity

2015-11-10T14:11:52.8730903+02:00   ?

Figure 4: Viewing an extranet user's history

C1 CMS

2.1.3 Deleting User

To delete an existing user account:

1. In the **Extranet** perspective, locate and click the user account you want to delete and click **Delete User** on the toolbar.

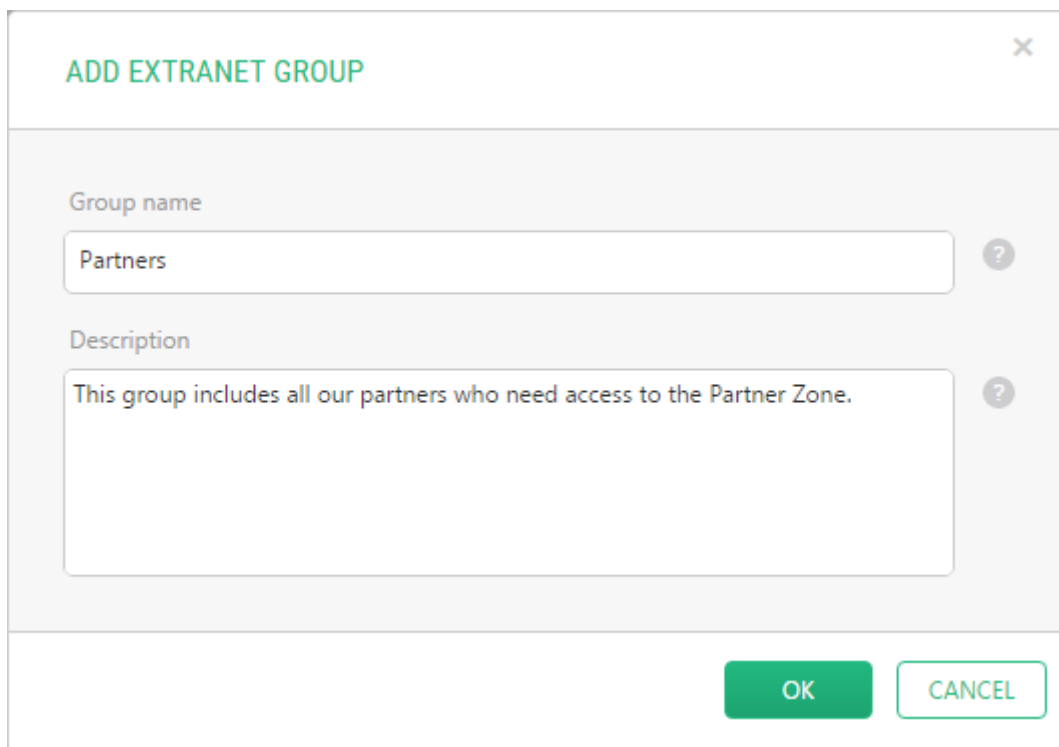2. Click **OK** in the confirmation dialog.

The user account has been deleted from your extranet.

2.2 Creating and Managing Groups

With groups, you can quickly manage access to web pages, media files or an entire website for multiple users. You create groups by specifying their names and, optionally, descriptions.

To create an extranet group:

1. In the **Extranet** perspective, expand **Extranet**.

2. Select **Groups** and click **Add Group** on the toolbar.

3. Specify the group's *name* and *description* in the **Add Extranet Group** dialog.

Figure 5: Creating an extranet user group

4. Click **OK**.

You can create as many user groups as you need.

Once you have created all the groups, proceed to assign users to the groups.

2.2.1 Editing Extranet Groups

When you are editing an extranet group, along with changing its name or description, you can also assign users to this group as well as set up a number of advanced properties that manage the group's permissions.

Extranet - User Guide

To edit a user group:

1. In the **Extranet** perspective, locate and click the user group you want to change settings for and click **Edit Group** on the toolbar. The user group settings form opens in the right pane.

2. On the **General** tab, change the name or description in the corresponding fields if necessary.

3. Assign users to the group by clicking **Edit Selections** and selecting users in the **Users in Group** dialog.

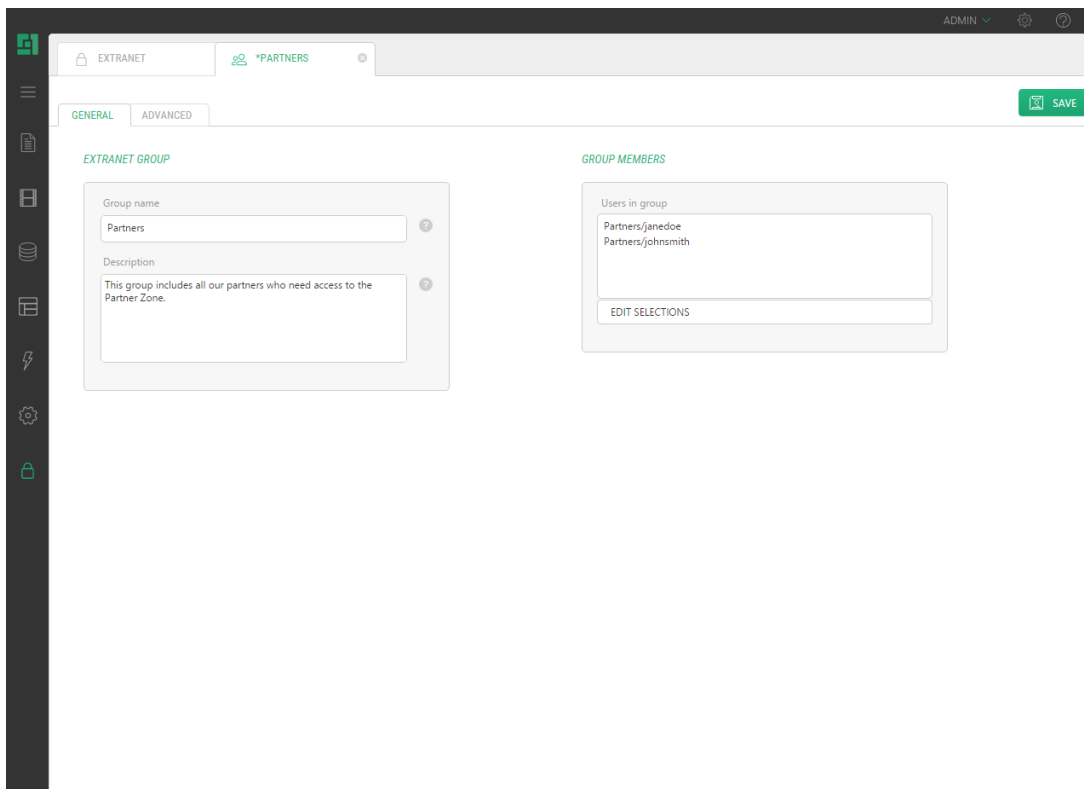
Figure 6: Editing an extranet user group

4. On the **Advanced** tab, set up the following properties where necessary:

▪ **Add, delete child groups**: If this option is checked, you will be able to add and delete child groups within this group. For this, an additional command will appear on the context-sensitive toolbar and in the context menu of this group – **Add Group**. By default, this option is unchecked.

▪ **Add, remove users**: If this option is checked, you will be able to add users to, and delete users from, this group. By default, this option is checked.

▪ **Can be assigned access rights**: If this option is checked, this group will be available for granting access to in the Content and Media perspectives when protecting web pages, media files or entire websites. By default, this option is checked.

Extranet - User Guide
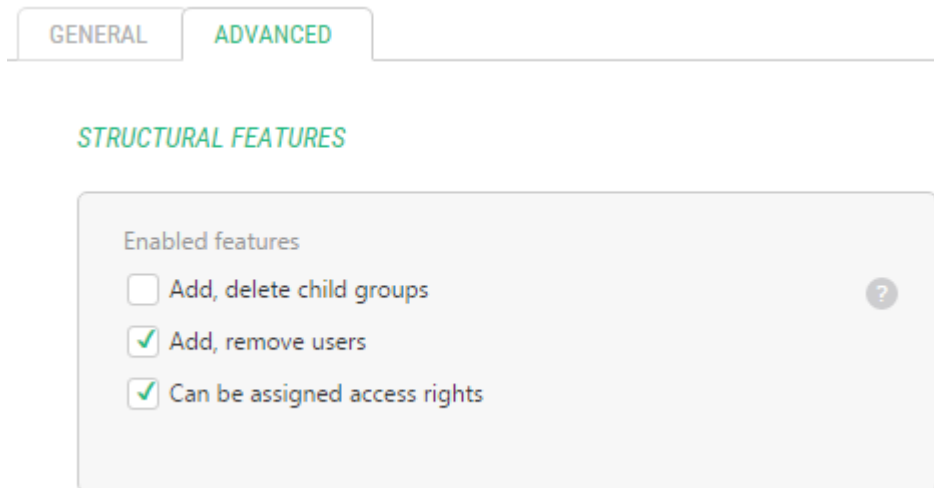
Figure 7: Setting up an extranet user group's advanced properties

2.2.2   Deleting Extranet Groups

To delete an existing user group:

1. In the **Extranet** perspective, locate and click the user group you want to delete and click **Delete Group** on the toolbar.

2. Click **OK** in the confirmation dialog.

The user group has been deleted from the extranet.

2.3   Assigning Users to Groups

Each user group should include one or more users. You assign users to user groups by editing groups and selecting one or more available users from the list.

To assign users to a group:

1. Expand **Groups**, select the group you want to assign users to and click **Edit Group** on the toolbar.

2. On the **General** tab, click **Edit Selections** for the **Users in Group** list. The **Users in Group** dialog will appear.

3. In the dialog, select users you want to assign to the group and click the **Add** (right-arrow) button.
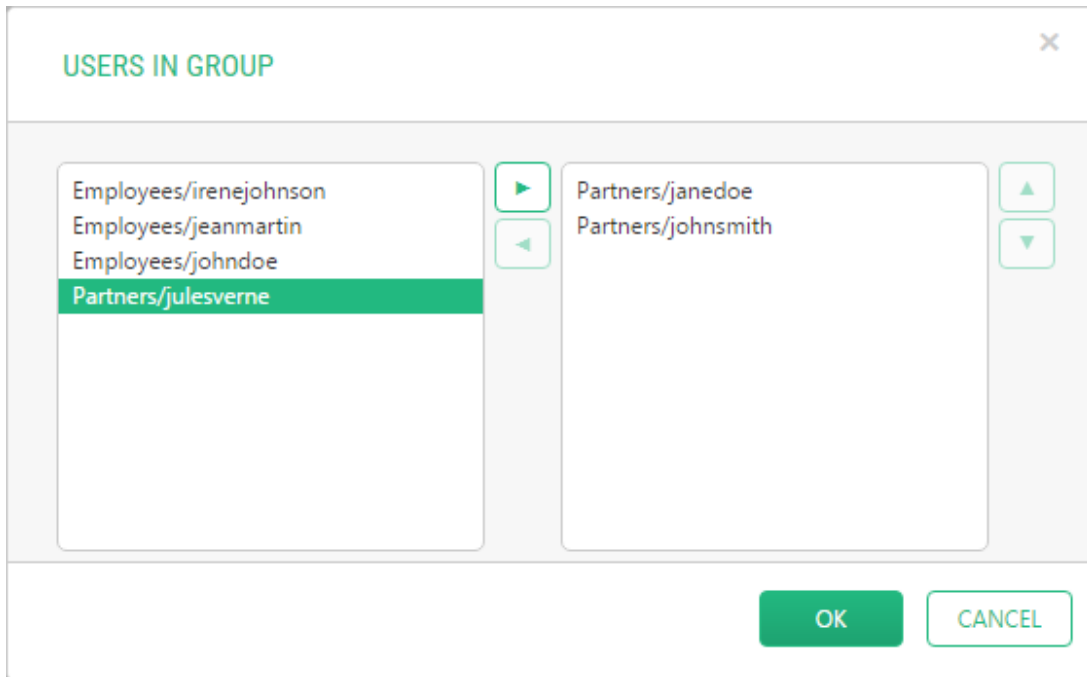
Figure 8: Assigning users to an extranet user group

4. Click **OK** and save changes to the group.

Now that you have assigned users to groups, go on to set up extranet security on your website.

2.4   Approving Users

Only approved users can access protected resources of your website.

If you have chosen not to approve the users when adding them to the extranet, you can do it later.

All unapproved users are indicated with an icon of a lighter color in the Extranet perspective.
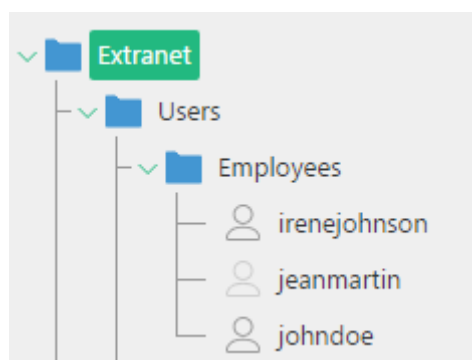

Figure 9: Approved and non-approved users

To approve users:

1. In the **Extranet** perspective, expand **Extranet**.

2. Select **Users** and click **Approve Users** on the toolbar. The **Approve Extranet Users** form opens in the right pane.

Figure 10: Approved extranet users

3. Click **Edit Selections**. The **Users That Are Approved** dialog appears.

4. In the dialog, select users you want to approve and click the **Add** (right-arrow) button.
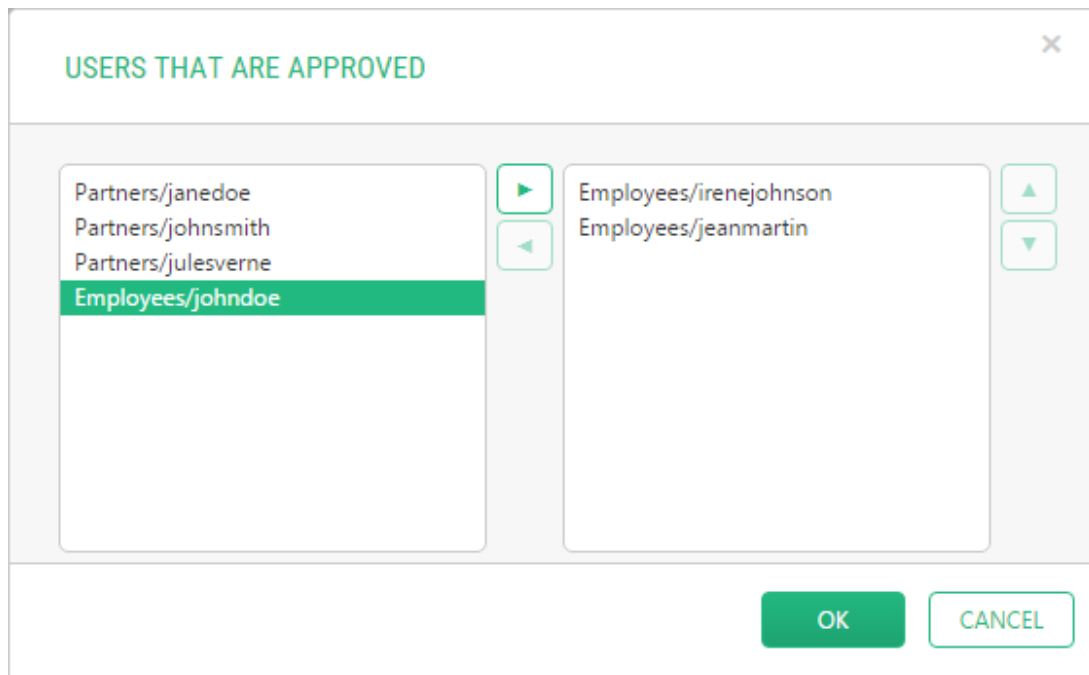

Figure 11: Selecting users for approval

5. Click **OK** and save the changes.

3   Setting Security on Pages and Files

Once you have defined what users can access your website resources, it is time to define what exactly they can access.

First, you need to create a web page where users will log in to your extranet-protected website. Then, you should add the login status information to web pages. Next, you have to activate the extranet security on your website. Finally, you should select which pages and media files to protect or protect the entire website.

Optionally, you can add possibilities for your website visitors to register in your extranet directly from your website. All the registered users may be allowed to change their passwords or get reminded of their passwords via email.

3.1   Setting Up Login Page

All the extranet users should first log in to access the pages and media files protected with extranet security. Therefore, you should set up a login page on your website. This page is always available to the general public access.

On this page, users will enter their credentials and by clicking the **Log In** button they will log in to your extranet and thus get access to all extranet-protected resources.

You set up a login page by adding the Login form to an existing or new web page.

To set up a login page:

1. In the **Content** perspective, under your website's homepage, add a new page, for example, "Login".

2. Add the **Composite.Community.Extranet.LoginForm** function to the page.

3. If necessary, set the optional parameters:

    - **Signup Page**: When specified, a link to the signup page is shown on the form.

    - **Password Recovery Page**: When specified, a link to the password recovery page is shown on the form.

    - **Login Success Page**: When specified, this page will be shown to the user who has successfully logged in.

4. Save and publish the page.

5. Click the **Preview** tab.

Figure 12: Login Form

The form has two fields: **User Name** and **Password** where the user enters his or her credentials and clicks the **Log In** button.

Now that you have set up a login page, go on to set up login status information on the existing pages.

3.2   Setting Up Login Status on Existing Pages

To keep users aware of their login status (logged in or logged off), you should add the status information on the extranet-protected pages.

The "iconified" version of the login status uses a graphic representation of the status:

- Locked (🔒): logged off
- Unlocked (🔓): logged in

This feature also allows the users to log off directly from the page they are currently viewing.

To set up login status on web pages:

1. In the **Layout** perspective, open to edit a template used for the pages you intend to protect with extranet security.

2. Add the **Composite.Community.Extranet.LoginStatus** function to the template.

3. If necessary, set the optional parameter:

    - **Iconified**: When checked (this is default), it shows the lock/unlock icon buttons and a dropdown login information.

4. Save the template.

If the user is logged in to your extranet, she or he will see her or his login status on each page as well as be able to log off by clicking the "lock" button and then the **"Click here to log out"** link in the drop down menu.

Figure 13: Login status at the top of the page

Once you have your login page and login status set up, proceed to the next step – activating the extranet security on your website.

3.3   Activating Extranet Security

After you have set up a login page and login status, you need to activate extranet security on your website.

To activate extranet security on a website:

1. In the **Content** perspective, right-click your website homepage and in the context menu, click **Add extranet security**.

2. Then in the **Add Extranet to Page** dialog, select the **Extranet provider** (i.e. your Extranet) and the Login page you have created in one of the previous steps.
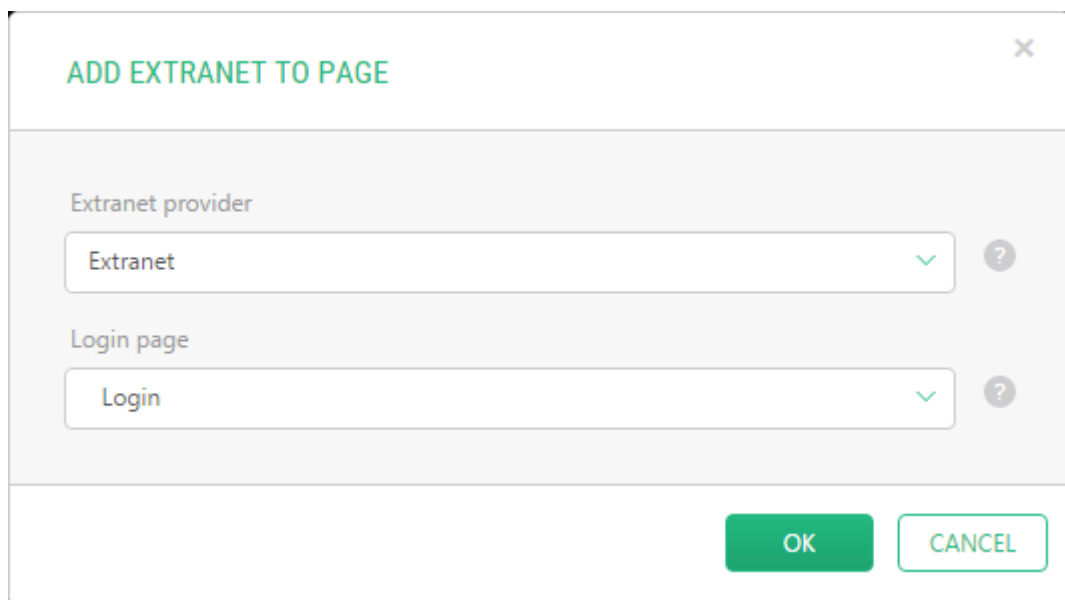

Figure 14: Activating extranet security

3. Click **OK**.

Now each page of your website will have an additional command – **Edit Extranet Security** – available in the page's context menu.

Now you can use this command to protect individual web pages or the entire website.

C1 CMS

3.3.1   Removing Extranet Security

To remove extranet security from your website:

1. In the **Content** perspective, right-click the homepage of your website and click **Remove extranet security** in the context menu.

2. Click **OK** in the confirmation dialog.

Now all the extranet security has been removed from your website and all the pages are available to the general public access.

3.4   Protecting Web Pages

You can set up extranet protection for individual web pages. You protect a web page by editing its extranet security and assigning an extranet user group to it. You can assign more than one user group to the page.

All the subpages that this page has will inherit its extranet security.

Once the group is assigned to a page, all the approved users within this group will be able to access the page after having successfully logged in to the extranet.

To protect a page (and all its subpages):

1. In the **Content** perspective, right-click the page and click **Edit extranet security** in the context menu. The page's extranet security settings form opens in the right pane.

   If this page is a subpage, all the groups inherited from its parent page will be listed in the **Inherited Groups** list. Otherwise, the **New Groups** list will be only available.

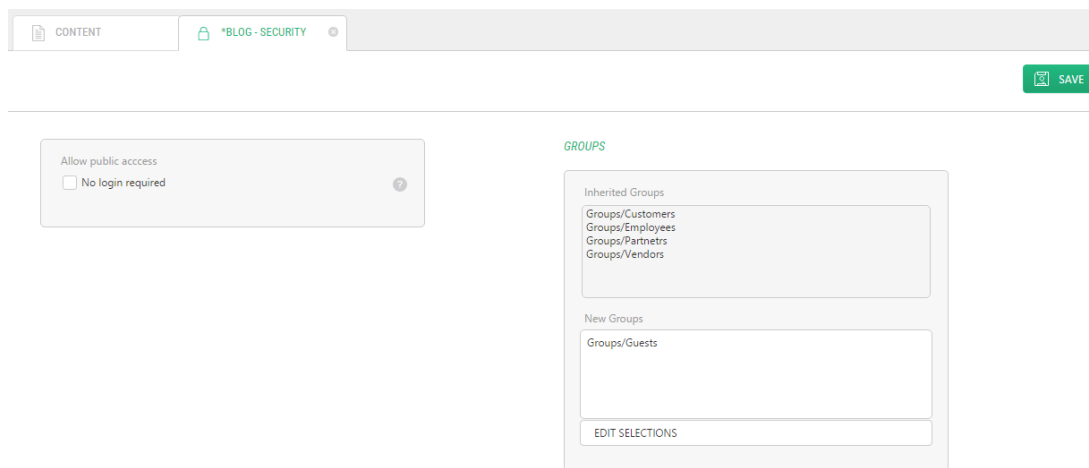   The **Inherited Groups** list is not editable.

Figure 15: Protecting a web page

2. Click **Edit Selections** for the **New Groups** list. The **New Groups** dialog opens.

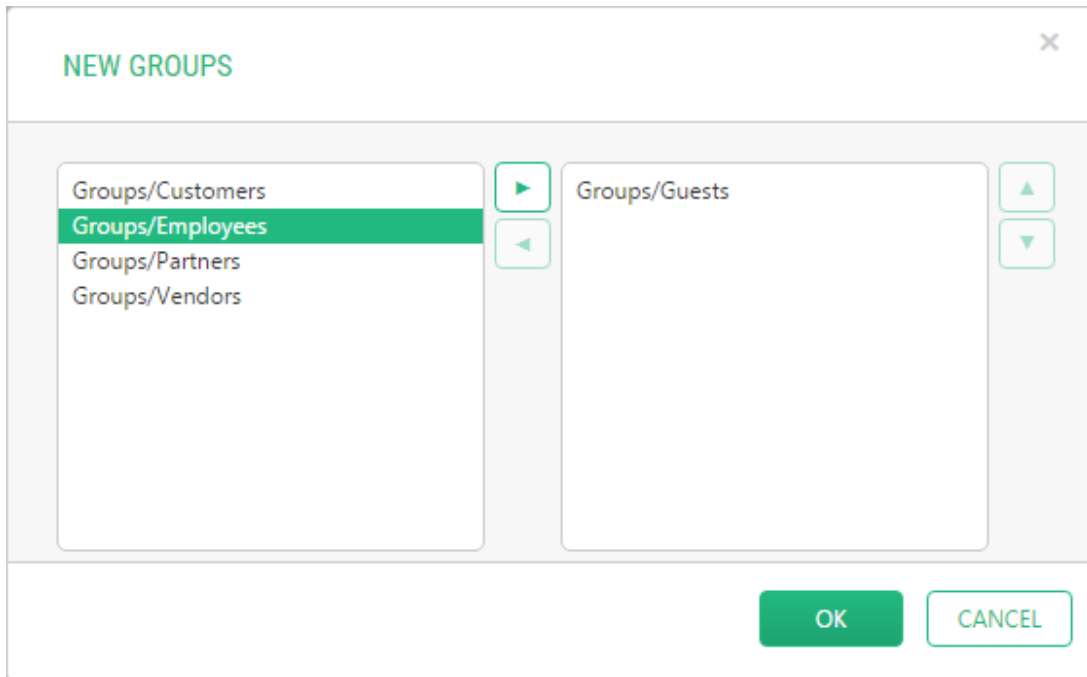3. In this dialog, select groups to be granted access to this page.

Figure 16: Selecting extranet groups to access the web page

4. Click **OK** and save the changes.

3.5   Protecting Entire Websites

You can secure all the pages on your website by assigning the extranet user groups to the homepage of your website. Because all sub pages will inherit the extranet security settings of its parent page, you can thus protect the entire website.

The steps for protecting the entire website are the same as the steps for protecting individual pages. This time you should only edit the extranet security for the homepage.

To give access to you website to all the approved users regardless the group they belong to, please consider the following section - Granting Access to All Authenticated Users.

3.6   Granting Access to All Authenticated Users

You can grant access to all the approved users regardless of the group they belong to by selecting the root extranet **Groups** group, instead of a specific group.

First, you need to make the **Groups** group available for selection when editing the extranet security on a page. By default, the **Groups** group is unavailable for selection.

Then, you need to select it for a page's extranet security instead of specific groups.

To grant access to all authenticated users:

1. In the **Extranet** perspective, click **Groups** and click **Edit Group** on the toolbar. The Groups settings form opens in the right pane.

2. On the **Advanced** tab, check the **Can be assigned access rights** option.

3. Click **Save**. Now the **Groups** (with all its subgroups) will be available for extranet security in the **Content** perspective.

4. In the **Content** perspective, right-click a page or your website's homepage and click **Edit extranet security** in its context menu.

5. In the right pane, click **Edit Selections** and in the **New Groups** dialog that appears, select **Groups**. All subgroups will be thus allowed access to the page or website.
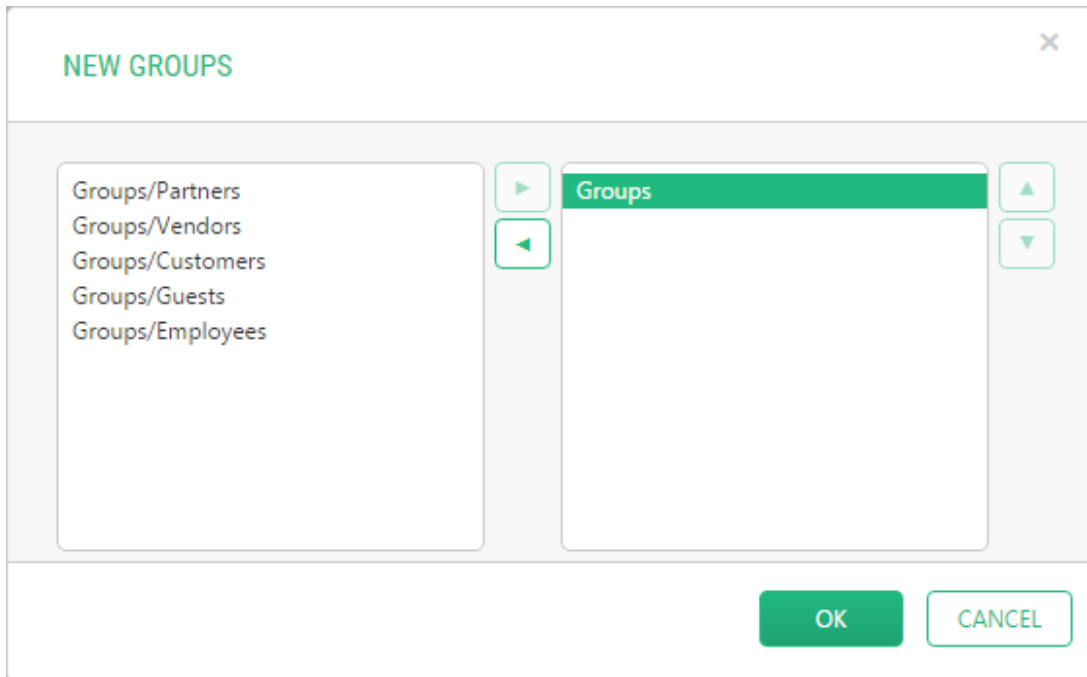

Figure 17: Granting access to all the extranet groups

6. Click **OK** and save the changes.

This will require that users should log in to the website and be a member of at least one group. Non-authenticated users will be redirected to the Login page.

3.7   Allowing Public Access to Protected Pages Selectively

You can allow anyone access to a specific protected page regardless of inherited or specified group restrictions:

1. Right-click a page you want to give public access to and click **Edit extranet security**.
2. In the page security view that opens, check the "**No login required**" option.
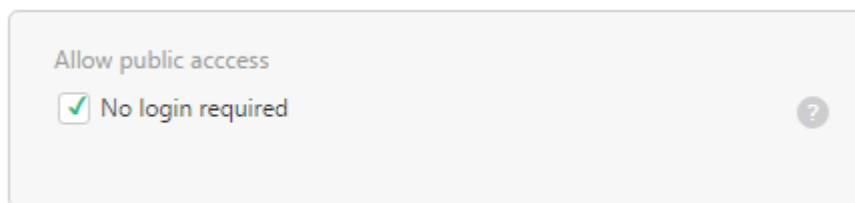3. Click **Save**.

Figure 18: Allowing public access to a specific page

Even though the page should be protected, anyone can access it on the website now

3.8   Protecting Media Files

Once you have protected pages on your website, you can also protect your media files.

The steps for protecting media files are similar to the steps of protecting web pages. First, you need to activate extranet security on your media folder. Then, you should assign user groups to access individual media files or the entire media folder.

To protect files in your media library:

1. In the **Media** perspective, locate the folder you want to protect, right-click it and click **Add extranet protection** in the context menu. The **Add Extranet Protection on Media** dialog appears.

2. In the dialog, select your **Associated extranet** from the drop-down list. It bears the name of your website (homepage).
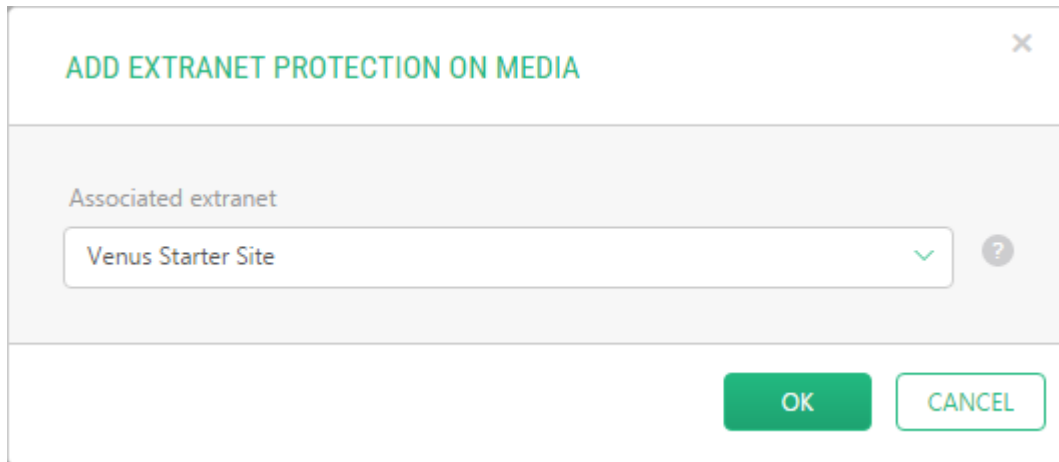

Figure 19: Activating extranet protection on media files

3. Click **OK**.

4. In the right pane, click **Edit Selections** and in the **New Groups** dialog, select the groups to be allowed access to this folder – in the same manner you did it with websites.

5. Click **OK** and save the changes.

Alternatively, instead of Steps 4 and 5, you can edit extranet security of, and assign extranet user groups to, each file in the folder individually.

3.9   Getting Overview of Protected Website Resources

As you assign groups to a website, pages and media folders and files, you need to keep track of what resources a specific group has access to.

The Extranet add-on provides you with this overview via its *View Secured Elements* functionality.

To have an overview of a group's access scope:

1. In the **Extranet** perspective, click a group you want an overview of and click **View Secured Elements** on the toolbar.

2. In the right pane, on the **Content** tab, you can view what websites and web pages this group has access to. On the **Media** tab, you can view what media folders and files this group has access to.

   Either or both tabs can be unavailable, if the group has no access set up yet in the **Content** or **Media** perspectives.
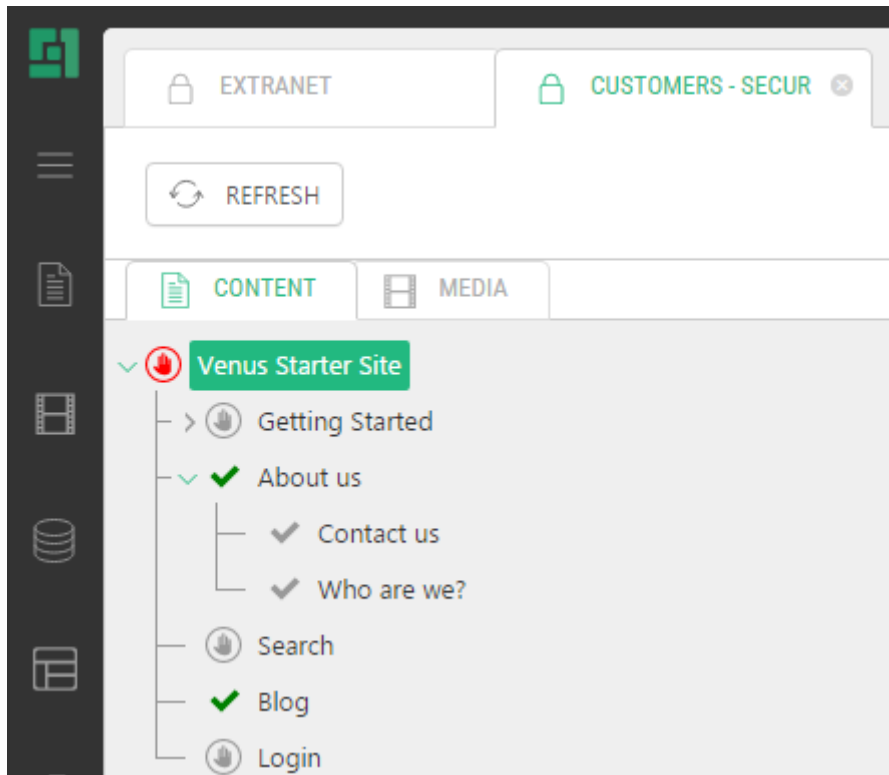
C1 CMS

Figure 20: Overview of secured website resources

A dedicated icon indicates the access status of each element (see the legend below):

Legend	
Graphic Representation	**Access Status**
✔	The group has access to the resource
✔	The group has access to the resource (inherited from the parent resource)
🔴	The group has no access to the resource
⬤	The group has no access to the resource (inherited from the parent resource)

Extranet - User Guide

C1 CMS

4 Setting Up Optional Functionality

With the Extranet add-on you can allow your website visitors to register on their own in order to get access to your extranet-protected website resources.

Besides, your registered users can change their passwords directly on your website or have their passwords sent to them via email when forgotten.

In the following few sections, we will consider the steps required to add these possibilities to your extranet-protected website.

4.1 Setting Up Registration Page

If you want any of your website visitors to register in your extranet by themselves, you should add a signup form to your website.

You can control this registration by:

- Automatically assigning all these users to a dedicated user group with restricted access to your website
- Specifying that all the users registered on your website in this manner are not approved until you approve them manually

To add a signup form to your website:

1. In the **Content** perspective, create a new page for your website.

2. Add the **Composite.Community.Extranet.SignupForm** function to this page. The function properties dialog appears.

3. Specify the function's parameters:

   ▪ **Auto assigned groups**: The groups the user is automatically assigned to on her or his registration. Required.

   ▪ **Auto approve user**: If the option is checked, all the users registering via this form will be automatically approved. By default, this option is unchecked. Required.

   ▪ **User folder name**: The user folder to add new users to.

   ▪ **Success message**: A message to show the user who has successfully signed up.

4. Click **OK** and save and publish the changes.

5. Click the **Preview** tab.

C1 CMS

Login settings

User Name

jane.smith

Password

●●●●●●●●●●●

Retype Password

●●●●●●●●●●●

User information

First Name

Jane

Last Name

Smith

Email

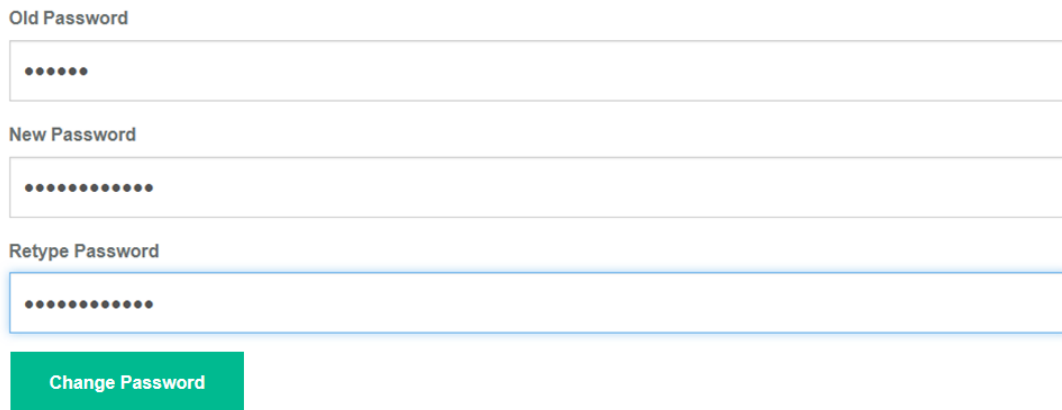jane.smith@contoso.com

Sign Up

Figure 21: Signup form

The user should enter her or his *user name* used for logging in to the extranet, *password* as well as specify her or his *name* and *email address* and click **Sign Up**.

4.2   Setting Up Change Password Page

It is a good security practice to regularly change passwords. You can allow your registered users to change their passwords on your website by making use of the Change Password form.

To add the Change Password form to your website:

1. In the **Content** perspective, create a new page for your website.

2. Add the **Composite.Community.Extranet.ChangePasswordForm** function to this page.

3. Save and publish the page.

4. Click the **Preview** tab.

C1 CMS

Figure 22: Change Password form

The user should enter her or his *old password*, then type a *new one* and *retype* it.
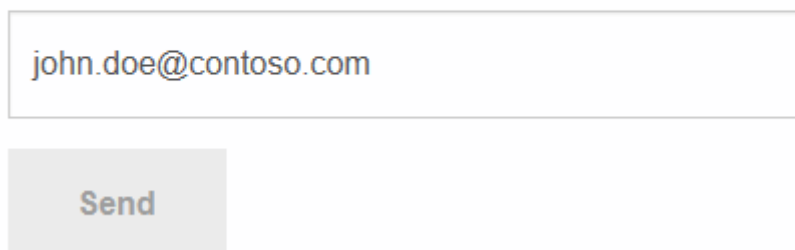
4.3 Setting Up Password Recovery Page

If registered users forget their passwords, they can have their passwords sent to them via email. All they need to do is to provide the email address they specified when they were registering. You can allow them to request a forgotten password making use of the Password Recovery form on your website.

To add the Password Recovery form to your website:

1. In the **Content** perspective, create a new page for your website.

2. Add the **Composite.Community.Extranet.PasswordRecoveryForm** function to this page.

3. Save and publish the page.

4. Click the **Preview** tab.

Figure 23: Password Recovery form

The user should enter her or his *email address* and click the **Send** button. If this email address belongs to one of the registered users, the latter will receive the password at the specified address.

4.4 Showing Group Specific Content

You can choose to only show some content to visitors who belong to one or more extranet groups and hide it from others:

1. Edit a page in the **Content** perspective or a template in the **Layout** perspective.
2. Click **Insert** > **Functions** in the **Content** perspective or **Insert** > **Function Markup** in the **Layout** perspective to open the **Select Function** window.
3. Select the **Composite.Community.Extranet.GroupSpecificContent** function.
4. In the **Function Properties** window, select the **Content** property and click **Edit HTML**.
5. Write the content you want the members of specified extranet groups to see when opening the page.
6. Click **OK**.
7. In the **Function Properties** window, select the **Group with access** property and check the extranet groups the members of which will see the above content on the page. If users are not members of these groups, they will not see this content.
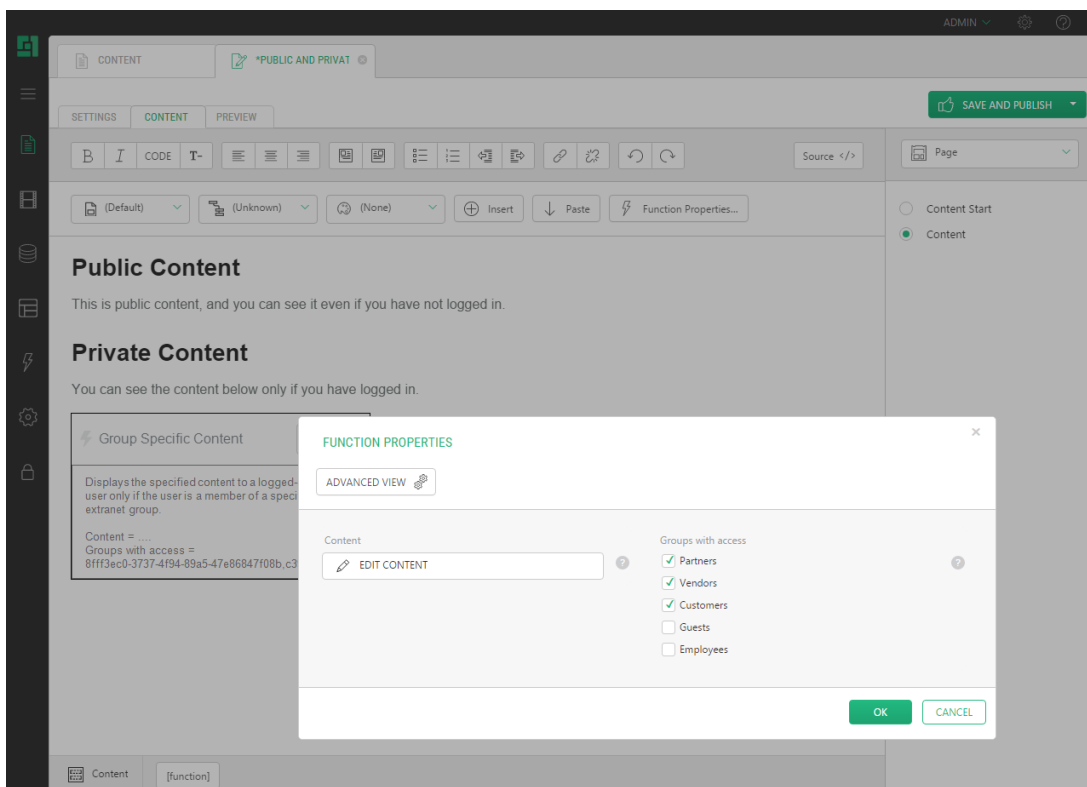8. Save the page.

Figure 24: Protecting content on a page

5 Test Your Knowledge

5.1 TASK 1

1. Create 4 users – *John*, *Jane*, *Michael*, *Joan*.
2. Create 2 user groups – "*Customers*" and "*Guests*".
3. Assign *John* and *Jane* to the "*Customers*" group.
4. Assign *Michael* and *Joan* to the "*Guests*" group.

5.2 TASK 2

1. In the Content perspective, create a page called "*Login*".
2. Add a login form to the page.

5.3 TASK 3

1. Create a page called "*Registration*".
2. Add a signup form to the page.
3. Disallow auto-approving users registered via the signup form.
4. Specify the "*Guests*" group to assign users to.

5.4 TASK 4

1. Activate extranet security on your website.
2. Allow the users in the "*Customer*s" groups to access all the pages on your website.
3. Allow the users in the "*Guests*" group to only access the "*Registration"* page.

5.5 TASK 5

1. Activate extranet protection on your media files.
2. Allow the users in the "*Customers*" groups to access all the media files.

5.6 TASK 6

1. Create a page called "*Contact Us*" and add contact information for general access.
2. Add specific contact information so that only your customers (members of the "Customers" group will see on this page.