III.3 RE User Group Descriptions

Basic Group
- **View Only**
  - Cannot change anything
  - Can view everything
  - Access to query and export
  - Add annotations
  - Add, edit, and delete for their dashboards
  - Cannot view gifts

Constituent Information
- **Constituent Rights**
  - Edit biographical information
  - Add and edit Alias’
  - Add and edit Addresses and phone numbers
  - Add and edit salutations
  - Add and edit constituent attributes
  - Add and edit annotations
  - Add and edit actions
- **Relationship Rights**
  - Add and edit individual relationships
  - Add and edit organization relationships
  - Add and edit education relationships
  - Add fund relationships
- **Constituent Batch Rights**
  - Add and edit constituent batches
  - Cannot commit the batches
- **Membership Rights**
  - Add and edit constituent memberships
- **Volunteer Rights**
  - Add and edit volunteer information on constituents
  - Add and edit timesheet batches (volunteer module)
- **Event Rights**
  - Add and edit event information
  - Add and edit event information on constituents
  - Add and edit actions for events
  - Add and edit jobs for events
o Add and edit Participants for events

- **Honor Memorial Rights**
  o Add and edit honor/memorial on constituent records

- **Media Rights**
  o Add and edit media on constituents

**Gift Information**

- **Gift Batch Rights**
  o Add and edit gift batches
  o Cannot commit gift batches

- **Appeal Rights**
  o Add and edit appeals
  o Add and edit appeals on constituents
  o Add and edit appeal actions

- **Campaign Rights**
  o Add and edit campaigns
  o Add and edit giving hierarchy

**Notes Access**

- **UAA Notes**
  o Add and edit UAA notes
  o View all others

- **UAF Notes**
  o Add and edit UAF notes
  o View all others

- **UAS Notes**
  o Add and edit UAS notes
  o View all others

- **SW Notes**
  o Add and edit SW notes
  o View all others

- **General Notes**
  o Add and edit general notes
  o View all others

**Specific Access**

- **Database Specialist**
  o Add and delete constituents
  o Delete rights for:
    - Aliases’
    - Addresses and phone numbers
    - Salutations
• Constituent attributes
• Annotations
• Actions
• Individual relationships
• Organization relationships
• Education relationships
• Fund relationships
• Memberships
• Volunteer information
• Event information
  o Administration rights
    • Global Add
      • Actions
      • Appeals
      • Attributes
      • Constituent Codes
      • Education
      • Emails
      • Memberships
      • Notepads
      • Participants
    • Global Change
    • Duplicate constituent (RE report, not mine)
    • Merge Constituents
    • Drop Lapsed Members
  o Mapping
• Report Rights
  o Can run, add, and edit reports
• Mail Rights
  o Can run, add, and edit mailings
• Prospect Rights
  o Can add, edit, and delete prospect information
• Fund Rights
  o Edit funds
  o Add and edit solicitors
  o Add and edit fund relationships
  o Cannot delete any funds or relationships
• Assigned Solicitors
  o Can add, edit, and delete assigned solicitors
  o Add and edit solicitor hierarchy