



Last Updated: April 2007

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



- Add and edit Participants for events
- **Honor Memorial Rights**
 - Add and edit honor/memorial on constituent records
- **Media Rights**
 - Add and edit media on constituents

Gift Information

- **Gift Batch Rights**
 - Add and edit gift batches
 - Cannot commit gift batches
- **Appeal Rights**
 - Add and edit appeals
 - Add and edit appeals on constituents
 - Add and edit appeal actions
- **Campaign Rights**
 - Add and edit campaigns
 - Add and edit giving hierarchy

Notes Access

- **UAA Notes**
 - Add and edit UAA notes
 - View all others
- **UAF Notes**
 - Add and edit UAF notes
 - View all others
- **UAS Notes**
 - Add and edit UAS notes
 - View all others
- **SW Notes**
 - Add and edit SW notes
 - View all others
- **General Notes**
 - Add and edit general notes
 - View all others

Specific Access

- **Database Specialist**
 - Add and delete constituents
 - Delete rights for:
 - Alias'
 - Addresses and phone numbers
 - Salutations



- Constituent attributes
- Annotations
- Actions
- Individual relationships
- Organization relationships
- Education relationships
- Fund relationships
- Memberships
- Volunteer information
- Event information
- 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
- Mapping
- **Report Rights**
 - Can run, add, and edit reports
- **Mail Rights**
 - Can run, add, and edit mailings
- **Prospect Rights**
 - Can add, edit, and delete prospect information
- **Fund Rights**
 - Edit funds
 - Add and edit solicitors
 - Add and edit fund relationships
 - Cannot delete any funds or relationships
- **Assigned Solicitors**
 - Can add, edit, and delete assigned solicitors
 - Add and edit solicitor hierarchy