MOBILIZESIMPLIFYENGAGE♦ MinistryPlatform

User Management & Staff Transitions

Andrea McGough - MP Support Supervisor

Stacy Sillasen - MP SQL/SSRS Developer Byron Brown - ACS Solutions Consultant



Tools to help staff transitions go smoothly...

Compare & Combine Security Roles Report (3/21)

User Rights & Restrictions Page (3/21)

Responsibilities Transfer Report (11/20)



Compare & Combine Security Roles Report

Basics:

- Available from the Security Roles Page in Administration
- Launched with at least two Security Roles selected
- Compares the rights and restrictions of any two security roles
- Combines any two security roles

Cautions:

- When combining, ALL users will have ALL rights and restrictions of BOTH roles
- Not to be used for application-specific or standard MP roles!



Report Parameters:

Role to Combine: Select the role that will be combined

<u>Role to Keep</u>: Select the role that will be kept <u>Table Name</u>: Optional table name. *This narrows the search for specific comparison only - it won't allow you to combine.*

Report Sections:

<u>Basics</u>: Identifies the number of people with each selected security role, as well as email and text quotas for each role. <u>Compare Rights & Restrictions</u>: Identifies the level of rights for each selected security role.



Role to Combine	Admin Assistant #1	\sim	Role to Keep	Admin Assistant #2	\sim	View Report
Table Name			VULL NULL			
	of 1 🕨 🕅 💠		Find Next 🔍 🗸 📀)		

Important! This report can be used to review and compare two roles. You may optionally combine one of them into the other. When the roles are combined, ALL users will have ALL rights and restrictions of BOTH roles. This report does not show items to which neither role has access. Save this report to pdf BEFORE combining roles to keep a record of the combined role.

Role to Combine: Admin Assistant #1 Compared to Role to Keep: Admin Assistant #2

Combine Roles

Basics

B Users Can Send 50 Texts vs. 10 with: Admin Assistant #2 (Role To Keep)

⊞ Users Only in: Admin Assistant #1 (Role to Combine) (1)

⊞ Users Only in: Admin Assistant #2 (Role to Keep) (3)

Compare Rights & Restrictions

Category/Item	Admin Assistant #1	Admin Assistant #2
Page & Sub Page Rights	Role to Combine	Role to Keep
Congregations	Read	Read
Events under Congregations	Read	Read
Households under Congregations		Read
Programs under Congregations	Read	Read
🗄 Tools		Role to Keep
Contact Log		Launch Tool

User Rights & Restrictions Read Only Page

Basics

- Found under Administration and is included in the Administrator Security Role
- Pre-loaded with multiple views
- Provides a comprehensive list of available access and/or restrictions for all users with at least one security role

Cautions:

• The read-only page will take a while to load each time you change your search criteria!



What Appears on the Page

<u>Item Type</u>: Page, Subpage, Report, Tool, etc.

<u>Item Name</u>: Specific page, report, or tool associated with the Item Type

<u>Access</u>: Highest level of access granted or the specific action granted

<u>Role List</u>: Qualifiers per specific role: R=Read, E=Edit, A=Mass Assign, D=Delete (Full)



	Contact Dis	Nickn	Item Type		Item Name 🔺	Access	Role List
2	Holden, Jim Jim Subpage Ca		Care Log (under Households)	Edit	Staff Basic Rights(E)		
	Holden, Jim	Jim			Contact Log	Read	Staff Basic Rights(R)
	Holden, Jim	Jim			m Subpage Cor		Contact Log (under Contacts)
	Holden, Jim	Jim	Page		Contacts	Edit	Staff Basic Rights(E)
	Holden, Jim	Jim	Subpage		Equipment (under Events)	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Page		Equipment Reservations	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Report		Event Listing	Launch	Staff Basic Rights
	Holden, Jim	Jim	Page		Event Participants	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Page		Events	Read	Staff Basic Rights(R)
5	Holden, Jim	Jim	Subpage		Events (under Groups)	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Subpage		Events (under Participants)	Edit	Staff Basic Rights(E)
	Holden, Jim Jim Subpage		Feedback (under Contacts)	Edit	Staff Basic Rights(E)		
	Holden, Jim	Jim	Report		Group Involvement Summary	Launch	Staff Basic Rights
)	Holden, Jim	Jim	Page		Group Participants	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Report		Group/Team Export	Launch	Staff Basic Rights
	Holden, Jim	Jim	Page		Groups	Read	Staff Basic Rights(R)
	Holden, Jim	Jim	Subpage		Groups (under Events)	Read	Staff Basic Rights(R)

Example #1 -Examining a User

In this example, Jim Holden has rights and/or access to specific Event items. Note which Role grants him the rights.

Hold	Holden,J,,Even Q 🔨 in View All Records 💙 🏹 Notify							
		Contact Displa	Nickname	Item Type Item Name		Access	Role List	
		Holden	J		Event			
	•	Holden, Jim	Jim	Page	Event Groups	None		
	٠	Holden, Jim	Jim	Page	Event Metrics	None		
		Holden, Jim	Jim	Page	Event Participants	Read	Staff Basic Rights(R)	
	٠	Holden, Jim	Jim	Page	Event Services	None		
	٠	Holden, Jim	Jim	Page	Event Types	None		
		Holden, Jim	Jim	Page	Events	Read	Staff Basic Rights(R)	
	٠	Holden, Jim	Jim	Report	Event Listing	Launch	Staff Basic Rights	
	٠	Holden, Jim	Jim	Report	Event Setup	None		
	٠	Holden, Jim	Jim	Subpage	Events (under Groups)	Read	Staff Basic Rights(R)	
		Holden, Jim	Jim	Subpage	Events (under Participants)	Edit	Staff Basic Rights(E)	
	٠	Holden, Jim	Jim	Tool	Event Metrics Tool	None		
		Holden, Jim	Jim	Tool	Event Rooms and Groups	None		



Example #2 -Showing Rights

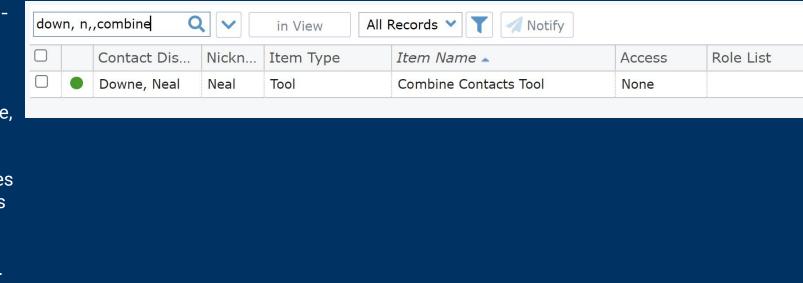
In this example, you can tell who can launch the Donor Household Retention Report, along with which Role grants them access.

0		-					
		Conta	Nickname	Item Type	Item Name	Access	Role List 🔺
				Report	Donor Household Retention	Launch	
	٠	Greer,	Jenny	Report	Donor Household Retention	Launch	Administrators
	٠	Hare	Heather	Report	Donor Household Retention	Launch	Administrators, Stewardship Manager
	٠	Hedd,	Katie	Report	Donor Household Retention	Launch	Administrators
	٠	Higgin	Matt	Report	Donor Household Retention	Launch	Administrators,QA 1 (Admin)
	٠	Higgy,	Barnabus	Report	Donor Household Retention	Launch	QA 1 (Admin)
	٠	Hoffm	Gayle	Report	Donor Household Retention	Launch	Administrators
	٠	Hoffm	Joanne	Report	Donor Household Retention	Launch	Administrators
0							



Example #3 -Excluding Rights

In this example, it's definitive that Neal absolutely does not have rights to use the Combine Contacts Tool.



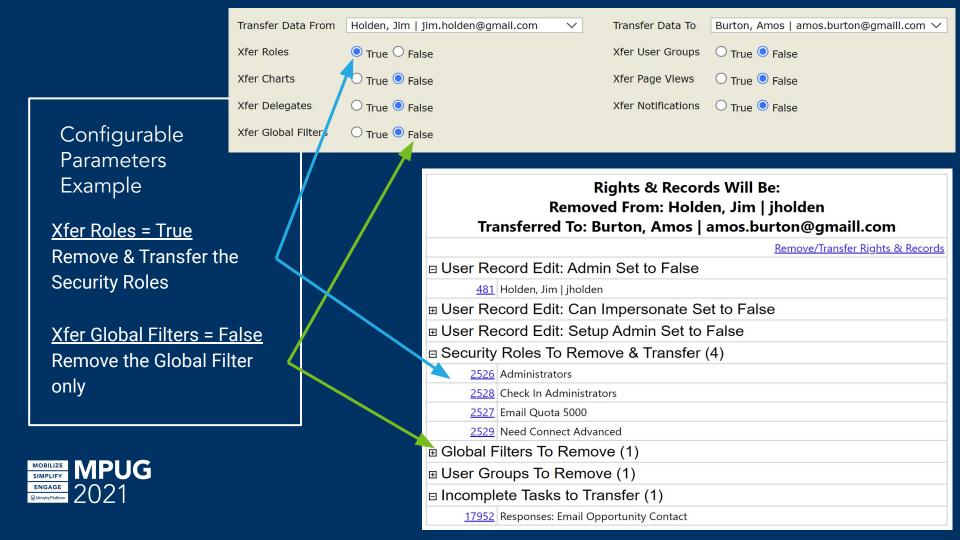


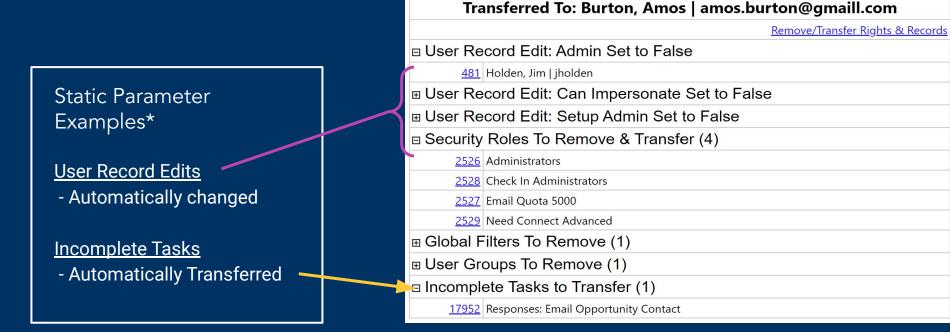
Responsibilities Transfer Report

Basics:

- Available from the Administration/Users page
- Used to transfer responsibility from one User to another User
- Launched with a current selection of two Users
- Some responsibilities are configurable via a parameter, and others are static and cannot be configured but will be affected when the report is finalized.
- Once finalized, this report removes rights from the departing User either by transfer or simply by removal, immediately!
- Run the report without finalizing it to aid in reviewing a User's responsibility and help strategically plan how their work will be assigned. (Choose any 'To' User.)
- The report affects many areas of the Platform and, as such, should be used with caution. Please reference the KB for all of the changes this report may make!







MOBILIZE MPUG SIMPLIFY DATE: ENGAGE Winder/Pattorn 2021 *How many static changes are possible? Put your guess in the chat NOW to win a Gift Card!

Rights & Records Will Be: Removed From: Holden, Jim | jholden

Questions?

Recommendations from the Community?



THANK YOU!

