



MPUG

2021

User Management & Staff Transitions

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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

Role to Keep: Select the role that will be kept

Table Name: Optional table name. *This narrows the search for specific comparison only - it won't allow you to combine.*

Report Sections:

Basics: Identifies the number of people with each selected security role, as well as email and text quotas for each role.

Compare Rights & Restrictions: Identifies the level of rights for each selected security role.

Role to Combine: Admin Assistant #1 Role to Keep: Admin Assistant #2 View Report

Table Name: ☒ NULL

1 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

- ☒ 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
<input checked="" type="checkbox"/> 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
<input checked="" type="checkbox"/> 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

Item Type: Page, Subpage, Report, Tool, etc.

Item Name: Specific page, report, or tool associated with the Item Type

Access: Highest level of access granted or the specific action granted

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

Contact Dis...	Nickn...	Item Type	Item Name ▲	Access	Role List
Holden, Jim	Jim	Subpage	Care Log (under Households)	Edit	Staff Basic Rights(E)
Holden, Jim	Jim	Page	Contact Log	Read	Staff Basic Rights(R)
Holden, Jim	Jim	Subpage	Contact Log (under Contacts)	Edit	Staff Basic Rights(E)
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)
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.

Holden,J,,Even				in View	All Records		Notify
<input type="checkbox"/>		Contact Displa...	Nickname	Item Type	Item Name	Access	Role List
		Holden	J		Event		
<input type="checkbox"/>		Holden, Jim	Jim	Page	Event Groups	None	
<input type="checkbox"/>		Holden, Jim	Jim	Page	Event Metrics	None	
<input type="checkbox"/>		Holden, Jim	Jim	Page	Event Participants	Read	Staff Basic Rights(R)
<input type="checkbox"/>		Holden, Jim	Jim	Page	Event Services	None	
<input type="checkbox"/>		Holden, Jim	Jim	Page	Event Types	None	
<input type="checkbox"/>		Holden, Jim	Jim	Page	Events	Read	Staff Basic Rights(R)
<input type="checkbox"/>		Holden, Jim	Jim	Report	Event Listing	Launch	Staff Basic Rights
<input type="checkbox"/>		Holden, Jim	Jim	Report	Event Setup	None	
<input type="checkbox"/>		Holden, Jim	Jim	Subpage	Events (under Groups)	Read	Staff Basic Rights(R)
<input type="checkbox"/>		Holden, Jim	Jim	Subpage	Events (under Participants)	Edit	Staff Basic Rights(E)
<input type="checkbox"/>		Holden, Jim	Jim	Tool	Event Metrics Tool	None	
<input type="checkbox"/>		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.

<input type="checkbox"/>		Conta...	Nickname	Item Type	Item Name	Access	Role List ▲
		<input type="text"/>	<input type="text"/>	Report	Donor Household Retention	Launch	<input type="text"/>
<input type="checkbox"/>	●	Greer,...	Jenny	Report	Donor Household Retention	Launch	Administrators
<input type="checkbox"/>	●	Hare...	Heather	Report	Donor Household Retention	Launch	Administrators,Stewardship Manager
<input type="checkbox"/>	●	Hedd,...	Katie	Report	Donor Household Retention	Launch	Administrators
<input type="checkbox"/>	●	Higgin...	Matt	Report	Donor Household Retention	Launch	Administrators,QA 1 (Admin)
<input type="checkbox"/>	●	Higgy,...	Barnabus	Report	Donor Household Retention	Launch	QA 1 (Admin)
<input type="checkbox"/>	●	Hoffm...	Gayle	Report	Donor Household Retention	Launch	Administrators
<input type="checkbox"/>	●	Hoffm...	Joanne	Report	Donor Household Retention	Launch	Administrators
<input type="checkbox"/>	●						

Example #3 - Excluding Rights

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

down, n,,combine

in View

All Records

Notify

<input type="checkbox"/>		Contact Dis...	Nickn...	Item Type	Item Name	Access	Role List
<input type="checkbox"/>		Downe, Neal	Neal	Tool	Combine Contacts Tool	None	

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!***

Configurable Parameters Example

Xfer Roles = True

Remove & Transfer the Security Roles

Xfer Global Filters = False

Remove the Global Filter only

Transfer Data From	Holden, Jim jim.holden@gmail.com	Transfer Data To	Burton, Amos amos.burton@gmail.com
Xfer Roles	<input checked="" type="radio"/> True <input type="radio"/> False	Xfer User Groups	<input type="radio"/> True <input checked="" type="radio"/> False
Xfer Charts	<input type="radio"/> True <input checked="" type="radio"/> False	Xfer Page Views	<input type="radio"/> True <input checked="" type="radio"/> False
Xfer Delegates	<input type="radio"/> True <input checked="" type="radio"/> False	Xfer Notifications	<input type="radio"/> True <input checked="" type="radio"/> False
Xfer Global Filters	<input type="radio"/> True <input checked="" type="radio"/> False		

Rights & Records Will Be: Removed From: Holden, Jim | jholden Transferred To: Burton, Amos | amos.burton@gmail.com

[Remove/Transfer Rights & Records](#)

☐ User Record Edit: Admin Set to False

[481](#) Holden, Jim | jholden

☐ User Record Edit: Can Impersonate Set to False

☐ User Record Edit: Setup Admin Set to False

☐ Security Roles To Remove & Transfer (4)

[2526](#) Administrators

[2528](#) Check In Administrators

[2527](#) Email Quota 5000

[2529](#) Need Connect Advanced

☐ Global Filters To Remove (1)

☐ User Groups To Remove (1)

☐ Incomplete Tasks to Transfer (1)

[17952](#) Responses: Email Opportunity Contact

Static Parameter Examples*

User Record Edits

- Automatically changed

Incomplete Tasks

- Automatically Transferred

Rights & Records Will Be:
Removed From: Holden, Jim | jholden
Transferred To: Burton, Amos | amos.burton@gmail.com

[Remove/Transfer Rights & Records](#)

☐ User Record Edit: Admin Set to False

[481](#) Holden, Jim | jholden

☐ User Record Edit: Can Impersonate Set to False

☐ User Record Edit: Setup Admin Set to False

☐ Security Roles To Remove & Transfer (4)

[2526](#) Administrators

[2528](#) Check In Administrators

[2527](#) Email Quota 5000

[2529](#) Need Connect Advanced

☐ Global Filters To Remove (1)

☐ User Groups To Remove (1)

☐ Incomplete Tasks to Transfer (1)

[17952](#) Responses: Email Opportunity Contact

*How many static changes are possible? Put your guess in the chat NOW to win a Gift Card!

Questions?

Recommendations from the Community?

THANK YOU!