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How to restrict users from accessing data

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How to restrict users from accessing sensitive data

This 'How To' will guide you through the process of setting up security restrictions and access levels in Donor Strategy so that you (as an administrator) can restrict your users from accessing certain data and functionality in Donor Strategy.

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Security in Donor Strategy

Donor Strategy 4 introduces the concept of Access Codes. Access Codes can be grouped together into Profiles and Profiles are then linked to a particular User.

eg : You could have a range of Access Code for working with financial information and group them together into a profile called "Finance". The profile "Finance" would then be linked to a particular user id.

Access Codes can be assigned to functionality, records and to fields.

Field level security

ReadAccess. If an Access Code is assigned to a fields ReadAccess property then the user must have the appropriate code in one of their profiles. If they do not then they cannot see that field in the browser, data entry forms, reports etc..

WriteAccess. If an Access Code is assigned to a fields WriteAccess property then the user must have the appropriate code in one of their profiles to be able to amend that particular field value.

DeleteAccess. If an Access Code is assigned to a records DeleteAccess property then the user must have the appropriate code to be able to delete the record.

Functionality level security

Each discrete piece of functionality has been given a unique Access Code (these are preinstalled with the system). eg : browse people, edit people, delete people, batch transactions etc..

To stop someone accessing a piece of functionality, simply remove the Access Code from their profile, or the profile from their User.

Functionality level security

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Areas covered by this document

- **Browse lists** (restricting access to certain **Receipts**/**Contacts**/**Members**/etc including **Freenotes** and **History**)
- **Tabs** within forms (only allow users to see certain tabs)
- **Fields**/**Columns** (restrict access to specific fields/columns)
- **Reports** (restrict access to reports)

Restrictions

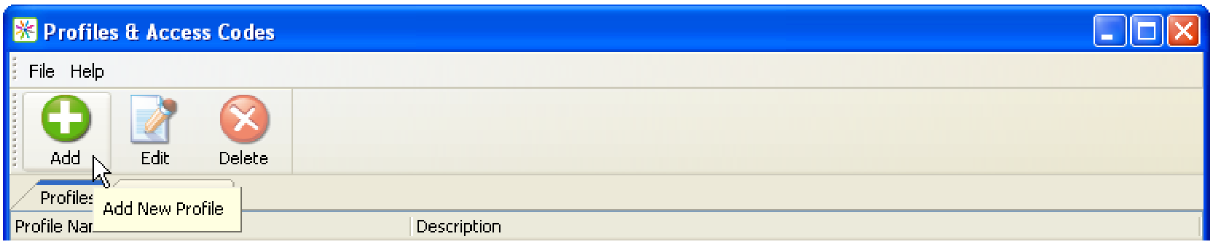
Data can be restricted in the following ways:

- **Read Access** (user cannot see the data)
- **Write Access** (user can see data and cannot edit it)
- **Delete Access** (user can see and edit but cannot delete data)

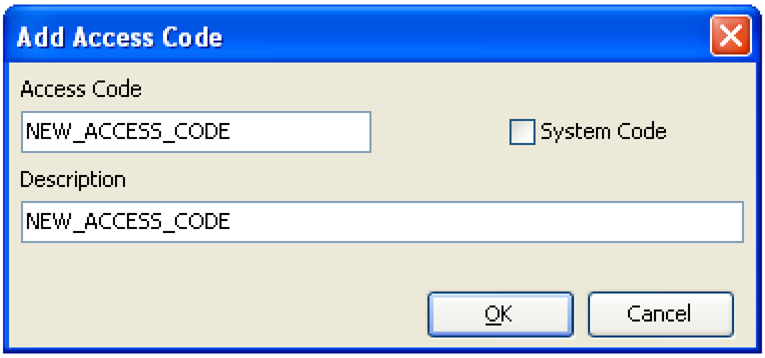
Screen Designer access overrides all user-set access restrictions: this is the **Access Code** CONFIGURE_FORMS found in the profile **Screen Designer** or sometimes ticked in **System Administrator**

Creating the Access Code

Go to **Control Panel > Profiles > Access Codes** tab > Click **Add**:



Fill in the form with a name appropriate to your needs:


Add Access Code

Access Code: NEW_ACCESS_CODE

□ System Code

Description: NEW_ACCESS_CODE

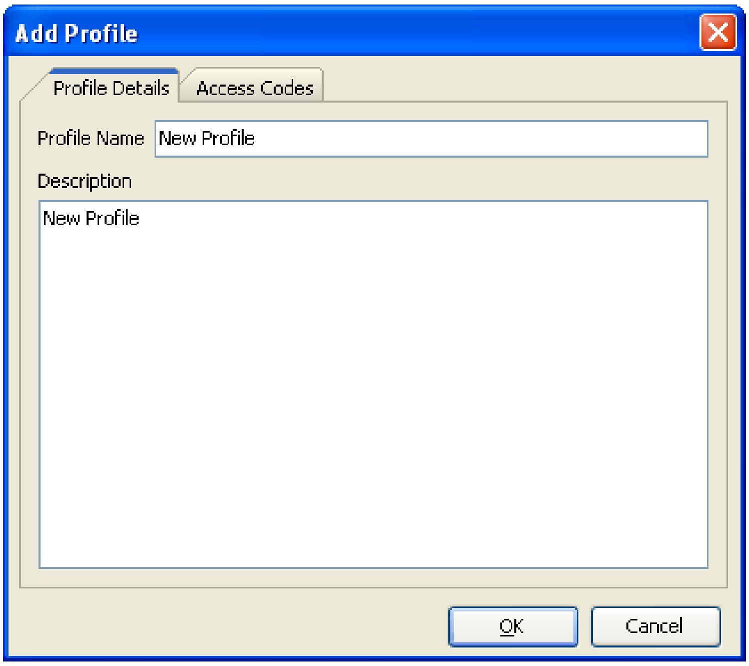
Make the **Description** the same as the **Access Code** for ease.

The **System Code** tick box cannot be ticked as this is reserved for access codes defined by IRIS Donor Strategy.

Profile

The new Access Code can be inserted into an existing **Profile** however it is normally much more useful to create a new profile so that you can be sure who you are not giving it to.

Go to **Control Panel > Profiles > Profiles tab** > Click **Add** and give your new **Profile** an appropriate **Profile Name** and **Description**:

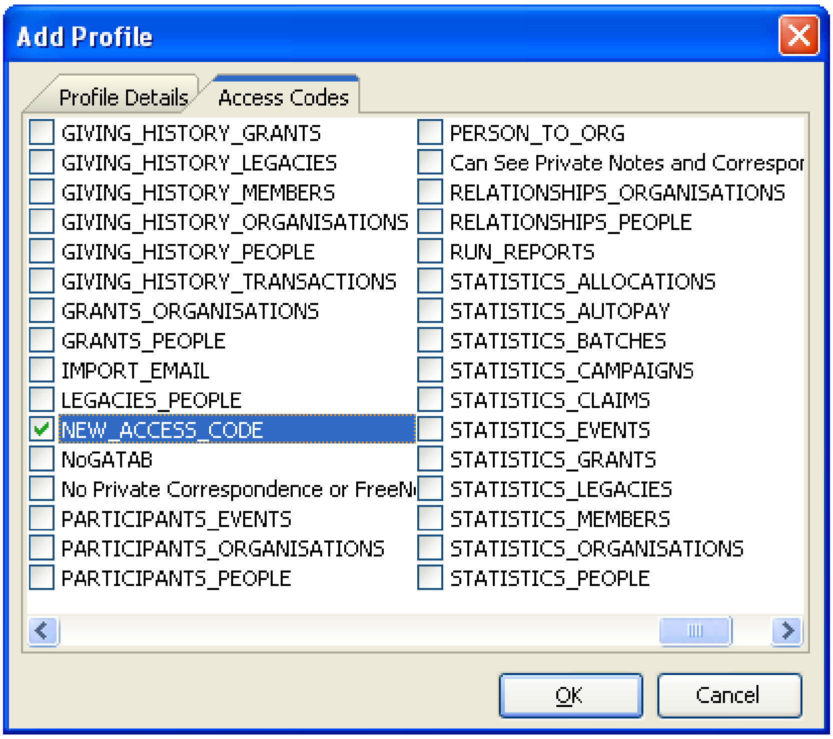


Add Profile

Profile Name: New Profile

Description: New Profile

Click to the **Access Codes tab** and tick your new **Access Code**



Add Profile

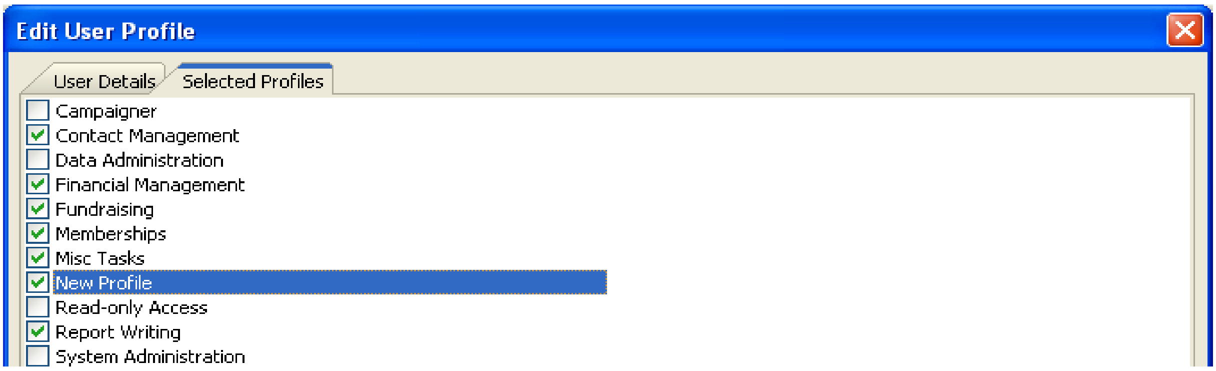
Profile Details | Access Codes

☐ GIVING_HISTORY_GRANTS
☐ GIVING_HISTORY_LEGACIES
☐ GIVING_HISTORY_MEMBERS
☐ GIVING_HISTORY_ORGANISATIONS
☐ GIVING_HISTORY_PEOPLE
☐ GIVING_HISTORY_TRANSACTIONS
☐ GRANTS_ORGANISATIONS
☐ GRANTS_PEOPLE
☐ IMPORT_EMAIL
☐ LEGACIES_PEOPLE
☑ NEW_ACCESS_CODE
☐ NoGATAB
☐ No Private Correspondence or FreeN
☐ PARTICIPANTS_EVENTS
☐ PARTICIPANTS_ORGANISATIONS
☐ PARTICIPANTS_PEOPLE
☐ PERSON_TO_ORG
☐ Can See Private Notes and Correspo
☐ RELATIONSHIPS_ORGANISATIONS
☐ RELATIONSHIPS_PEOPLE
☐ RUN_REPORTS
☐ STATISTICS_ALLOCATIONS
☐ STATISTICS_AUTOPAY
☐ STATISTICS_BATCHES
☐ STATISTICS_CAMPAIGNS
☐ STATISTICS_CLAIMS
☐ STATISTICS_EVENTS
☐ STATISTICS_GRANTS
☐ STATISTICS_LEGACIES
☐ STATISTICS_MEMBERS
☐ STATISTICS_ORGANISATIONS
☐ STATISTICS_PEOPLE

Allowing and Restricting Access

Choose which **Users** you wish to allow access to your restricted data and which you wish to restrict. Do nothing to those you wish to restrict. Add your new **Profile** to all those you wish to allow:

Go to **Control Panel > Users >** Highlight **User** > click **Edit** > choose the **Selected Profiles** tab and tick the new **Profile** for the **Users** that you want to be able to access the information (not giving it to those whom you wish to restrict).



Edit User Profile

User Details | Selected Profiles

☐ Campaigner
☑ Contact Management
☐ Data Administration
☑ Financial Management
☑ Fundraising
☑ Memberships
☑ Misc Tasks
☑ New Profile
☐ Read-only Access
☑ Report Writing
☐ System Administration

Screen Designer access overrides all user-set access restrictions: this is the **Access Code** CONFIGURE_FORMS found in the profile **Screen Designer** or sometimes ticked in **System Administrator**

Specifying Data to Restrict

In each area, data can be restricted in three ways:

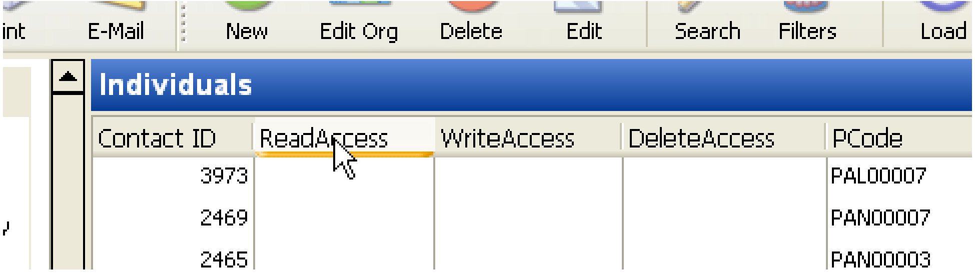
- Remove altogether (**Read Access**)
- Allow users to see but not amend (**Write Access**)
- Allow users to see and edit but not delete (**Delete Access**)

Browse Lists

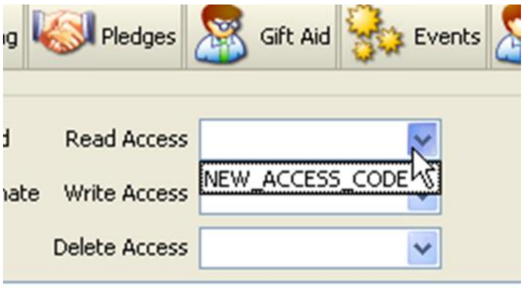
Data can be restricted from appearing in the **Browse List** (or entire records set to write only or 'edit but not delete').

Add the field to the browse list

The fields **ReadAccess**, **WriteAccess** and **DeleteAccess** are not visible by default. They need to be added to the Browse List (or a space within the record) in order to set the restriction:



Contact ID	ReadAccess	WriteAccess	DeleteAccess	PCode
3973				PAL00007
2469				PAN00007
2465				PAN00003



Read Access: NEW_ACCESS_CODE

Write Access:

Delete Access:

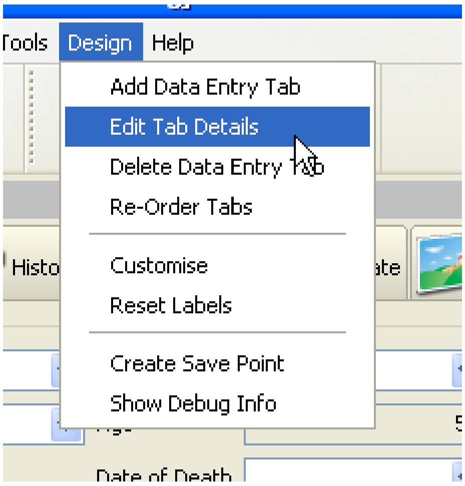
For information on these features, see section 2.3.4.1 – 'Columns' or section 11 –
'Customising Donor Strategy' in the user manual.

Freenotes and History

The above process can be used to restrict access to individual **Freenotes** and correspondence in the **History tab** in the same way.

Tabs with in forms

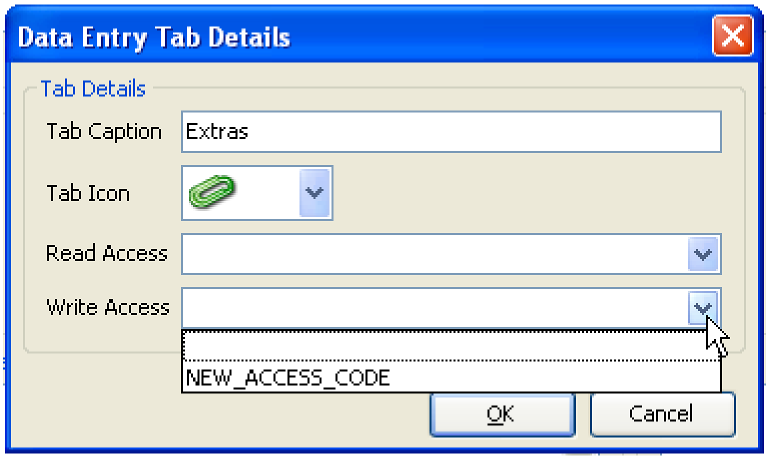
Tabs can be restricted from **Users** by editing the **Tab Details** in the **Design** menu:



The **Design** menu is only available with **Screen Designer** access: this is the **Access Code** CONFIGURE_FORMS found in the profile **Screen Designer** or sometimes ticked in **System Administrator**. If you need assistance with this feature please contact donorstrategy.support@advancedcomputersoftware.com or call support on 0845 2 26 25 44

Screen Designer access overrides all user-set access restrictions.

Read Access or **Write Access** can be selected from here:


Data Entry Tab Details

Tab Details

Tab Caption: Extras

Tab Icon

Read Access

Write Access

NEW_ACCESS_CODE

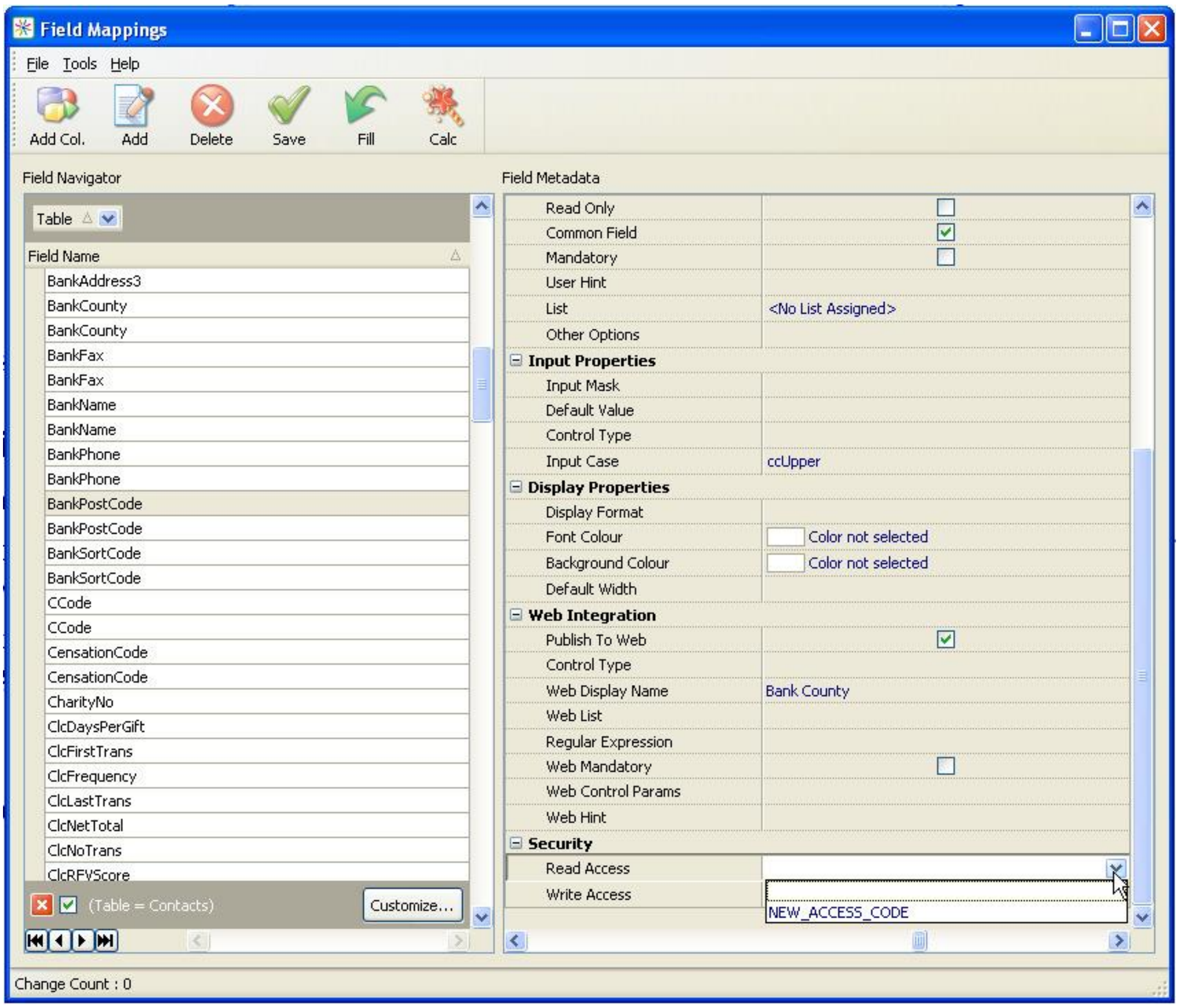
The **Access Code** that you have created will be found in the drop-down list for these fields (this may require a re-start). Set the restriction by selecting the **Access Code** and saving changes. Users will no longer be able to see or edit the entire tab.

Fields/Columns

Particular fields/columns can be restricted using the security settings in **Field Mappings**:

Go to **Control Panel > Field Mappings** and add your **Access Code** to the field of your choosing:

First select your **Table** in the top left, then find the **Field** in the left side pane, then scroll down the right-hand side to the **Security Settings**)



Field Name:
BankAddress3
BankCounty
BankCounty
BankFax
BankFax
BankName
BankName
BankPhone
BankPhone
BankPostCode
BankPostCode
BankSortCode
BankSortCode
CCode
CCode
CensationCode
CensationCode
CharityNo
ClcDaysPerGift
ClcFirstTrans
ClcFrequency
ClcLastTrans
ClcNetTotal
ClcNoTrans
ClcRFVScore

☒ ☑ (Table = Contacts)

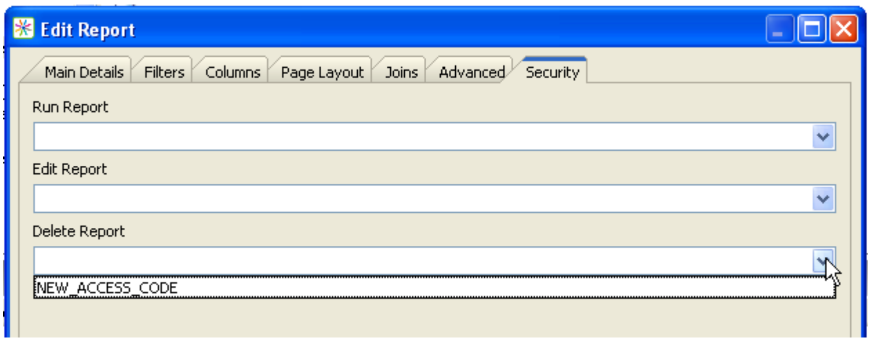
Read Only	□
Common Field	☑
Mandatory	□
User Hint	
List	<No List Assigned>
Other Options	
Input Properties	
Input Mask	
Default Value	
Control Type	
Input Case	ccUpper
Display Properties	
Display Format	
Font Colour	Color not selected
Background Colour	Color not selected
Default Width	
Web Integration	
Publish To Web	☑
Control Type	
Web Display Name	Bank County
Web List	
Regular Expression	
Web Mandatory	□
Web Control Params	
Web Hint	
Security	
Read Access	NEW_ACCESS_CODE
Write Access	

The **Access Code** that you have created will be found in the drop-down list for these fields (this may require a re-start). Set the restriction by selecting the **Access Code** and saving changes.

Reports

Any **Report** can be restricted from users viewing it, editing it or deleting it.

Go to **Reports > Edit report > Security tab**:



Run Report

Edit Report

Delete Report

NEW_ACCESS_CODE

The **Access Code** that you have created will be found in the drop-down list for these fields (this may require a re-start). Set the restriction by selecting the **Access Code** and saving changes. Setting any of these security features will make the appropriate restrictions apply to the report.

For further advice please contact the Support Team on 0845 2 26 25
44 or email donorstrategy.support@advancedcomputersoftware.com.

Thank you.