



# CAMPAIGN MANAGEMENT: USERS & GROUPS PERMISSIONS

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## Introduction

The **Users & Groups** level, which is located at the bottom of the navigation tree in Campaign Management, provides administrators the ability to add, edit, and delete users and groups, associate users, and manage user and group permissions. This document contains information on how to perform these tasks for your organization.



Users are created by an existing administrator with eligible permissions. A new user profile is mandatory for anyone requiring access to Campaign Management. It is important to know the job functions a new user will need to perform in the system. This is a key step in creating new user accounts and assigning permissions because each user is assigned to a group that grants or restricts the user access to the various areas of OPPS. Additionally, users are associated to the organizations, companies, campaigns, donor groups, and websites they are expected to work with.




## Users

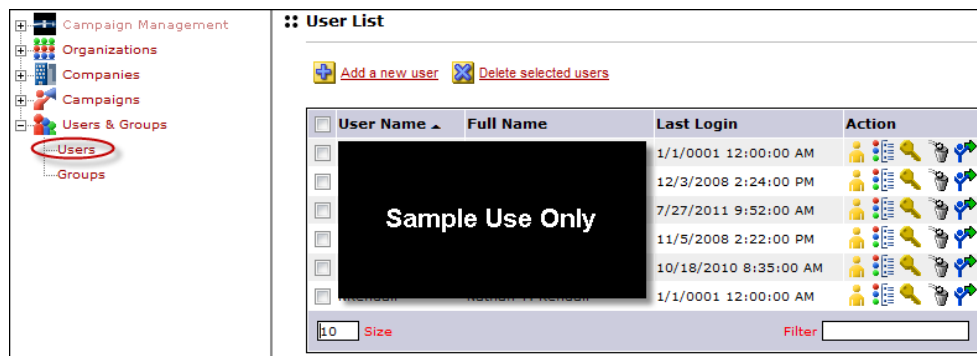
The **Users** section of the **Users & Groups** level contains all users currently created under your organization. From here, administrators can add new users, edit current users, manage permissions, assign users to a group, and associate users. From this section administrators can also track a user's activity via the history trail.

### Manually Creating a New User

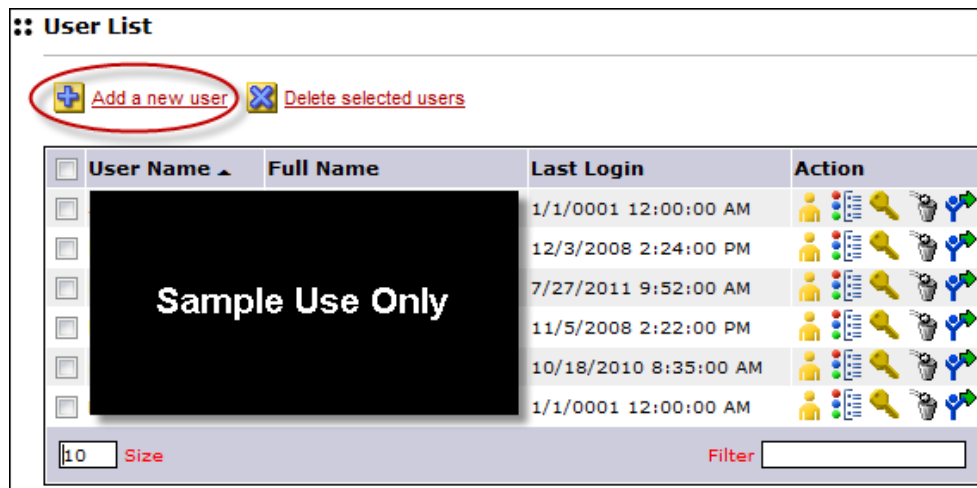
Any individual requiring access to OPPS must have a user profile in the system.

To add a new user and establish a user profile, take the following steps:

1. Expand the  **Users & Groups** level of Campaign Management and click **Users**.



2. Click  **Add a new user**.



3. Fill in the appropriate information in the fields provided, and then click  **Save / Update**.



**Note:** As a best practice, the username should include an email address, company name, or some other common convention so multiple users can be located at once. Avoid usernames such as “Test01.”

**:: Add User**

\* = required

Username  \*

Password  \*

Password Confirmation  \*

Last Password Changed (expire on < n/a >)

Failed Login Attempts 0 (max allow: 5)

Last Login < n/a >

Login Count 0

First Name  \*



Middle Name

Last Name  \*

Email Address  \*

**History**


Date	User	Event	Comments
none			

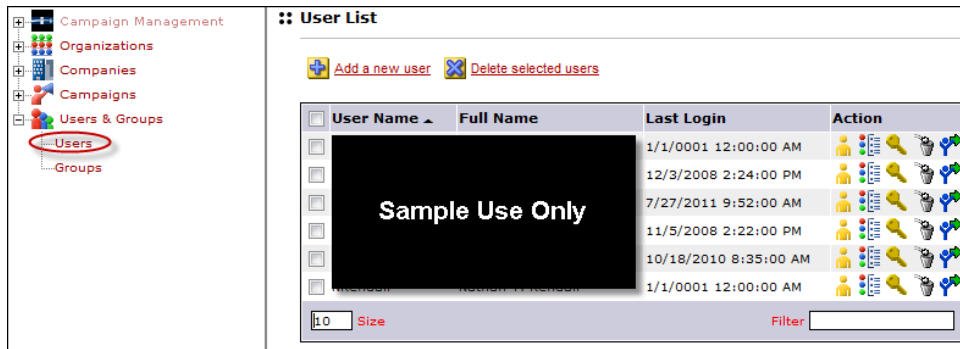
 [Save / Update](#) | 
  [Cancel / Return](#)

## Manually Editing a User

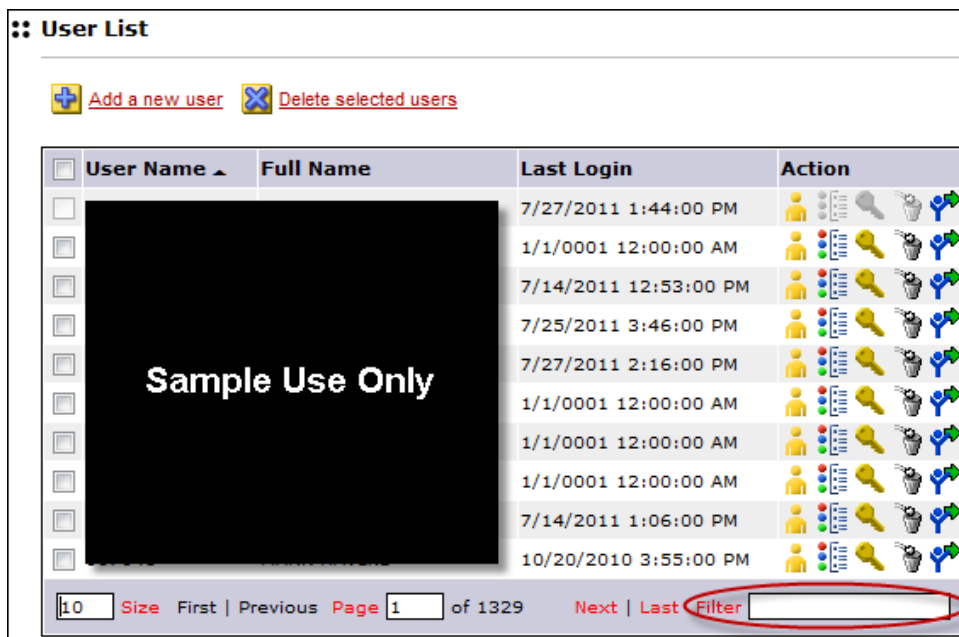
All user profile fields, with the exception of the username, can be edited at any time. Modifications are reflected immediately, upon saving.


To edit a user profile, take the following steps:

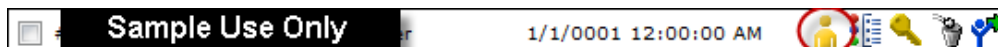
1. Expand the  **Users & Groups** level of Campaign Management and click **Users**.




2. Search for a user by entering their username, or first and/or last name in the **Filter** field.



3. When a specific user is found, click , located to the right of their profile name. Clicking this will open the user's profile.



4. Edit information as desired in any of the available fields. Note you can drill through each tab to edit group memberships, permissions, and associations.

**Note:** Remember to click  [Save / Update](#) if you edit information in each tab.



Navigation: User | Member Of | Permissions | Associations

\* = required

Username:  \*

Password:  (value not shown)

Password Confirmation:

Last Password Changed: 5/12/2011 5:36:00 PM (expire on 8/10/2011)

Failed Login Attempts: 0 (max allow: 5)

Last Login: 7/27/2011 1:30:00 PM

Login Count: 123

First Name:  \*

Middle Name:

Last Name:  \*

Email Address:  \*

Note a user history trail is available here

**History**

Date	User	Event	Comments
7/11/2011 8:03:06 AM CST/CDT	Sample Use Only	Update	Associated Organization added
6/13/2011 8:47:17 AM CST/CDT		Update	
6/13/2011 8:46:58 AM CST/CDT		Update	Permissions updated.
6/13/2011 8:46:34 AM CST/CDT		Update	Member Of Groups updated.
5/13/2011 11:29:24 AM CST/CDT		Update	Associated Organization removed

5. When finished, click [Save / Update](#).

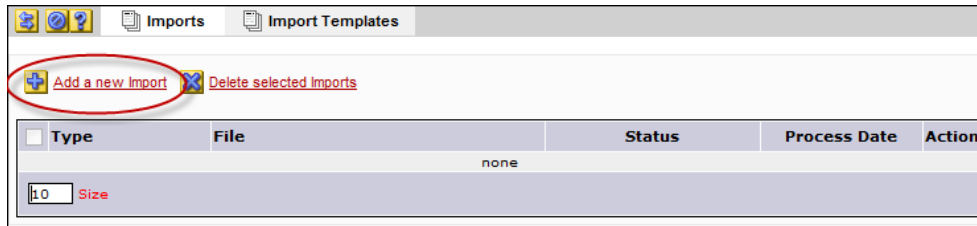
### Adding and Editing Multiple Users via an Import

As an alternative to adding and editing users manually, administrators have the opportunity to upload users and user information via an import. There are three importing actions available:

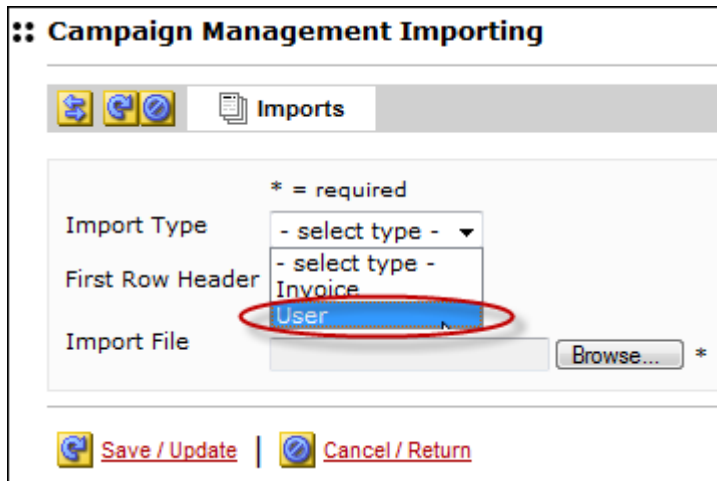
- **Add New Users** – The **Add New Users** import will create a user profile, assign a default group role, and associate new users to your organization, one company, one campaign, one donor group, and one website.
- **Add and Update Users** – In addition to creating new user profiles, assigning default group roles, and associating new users to your organization, one company, one campaign, one donor group, and one website, the **Add and Update Users** import will also update all existing users in the system.
- **Update Existing Users** – The **Update Existing Users** import will update all existing users in the system.

To load a user import, take the following steps:

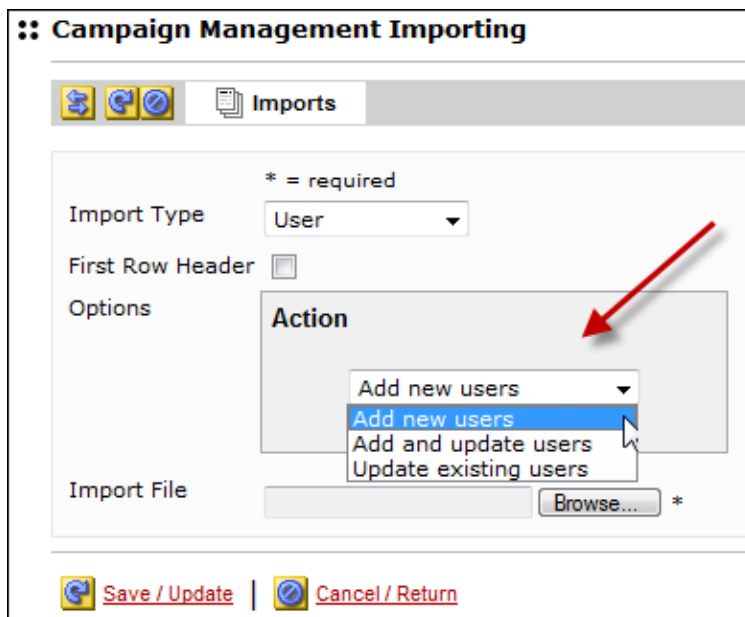
1. Expand the **Campaign Management** level of OPPS.
2. Select **Importing** from the navigation tree.
3. Click [Add a new Import](#).



4. For the Import Type, select "User."

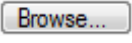


5. For the Action, select "Add new users," "Add and update users," or "Update existing users."



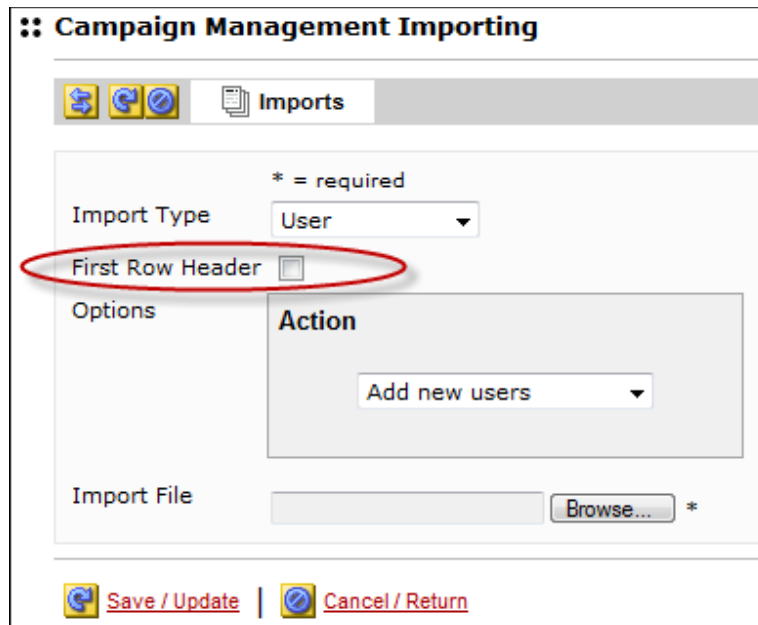





- Click  to upload a file.

**Note:** For file specifications, please refer to the **Support Site**, at <http://support.truist.com>.



- Check **First Row Header** if the file contains a header row.



The screenshot shows the 'Campaign Management Importing' interface. At the top, there are navigation icons and a tab labeled 'Imports'. Below this, there is a section for 'Import Type' with a dropdown menu set to 'User'. A note indicates '\* = required'. The 'First Row Header' checkbox is highlighted with a red circle. Below this, there is an 'Options' section with an 'Action' dropdown menu set to 'Add new users'. At the bottom, there is an 'Import File' field with a 'Browse...' button and an asterisk. At the very bottom, there are two buttons: 'Save / Update' and 'Cancel / Return'.

- Click  [Save / Update](#).

## Managing User Permissions

All users within the system must be assigned permissions in order to perform tasks within OPPS. Permissions are assigned to a user by either associating them to a group role (see section **Assigning Group Permissions** for details) or granting them permissions. Default permissions are visible under the  **Permissions** tab, and if the user has been assigned as a member of a group, additional permissions will be available. From the  **Permissions** tab administrators can check or uncheck various permissions for a specific user. This allows you to provide some users within a group very limited access, while granting other users more access. The permissions you decide to give to various users within the system will fully depend on what their job tasks entail.

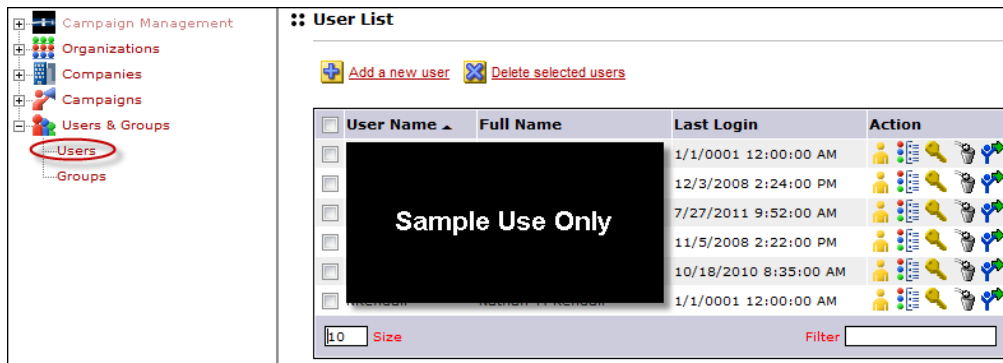
See Appendix A for details on each permission category.



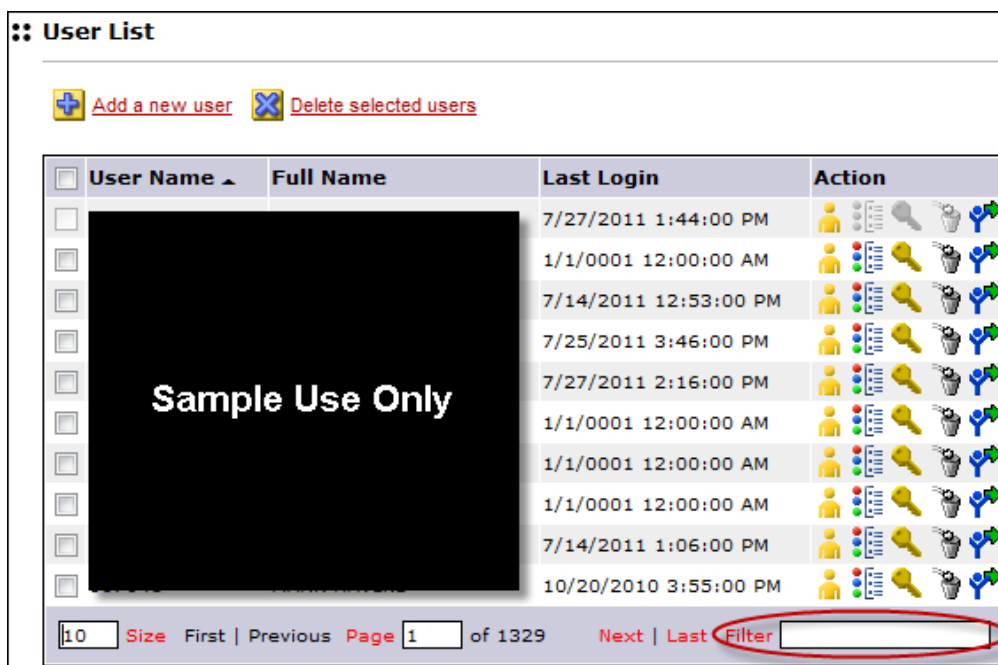
To manage user permissions, take the following steps:

**Note:** If you have just created a new user, and are already in their user profile, in the **Users** section of OPPS, you can skip steps 1-3. After all the new user's required information is entered and saved, the navigation bar across the top of the **User** page will enable, and you will have access to the **Permissions** tab. Click this tab instead of searching for a user through the filtering system.


1. Expand the **Users & Groups** level of Campaign Management and click **Users**.




2. Search for a user by entering their username, or first and/or last name in the **Filter** field.




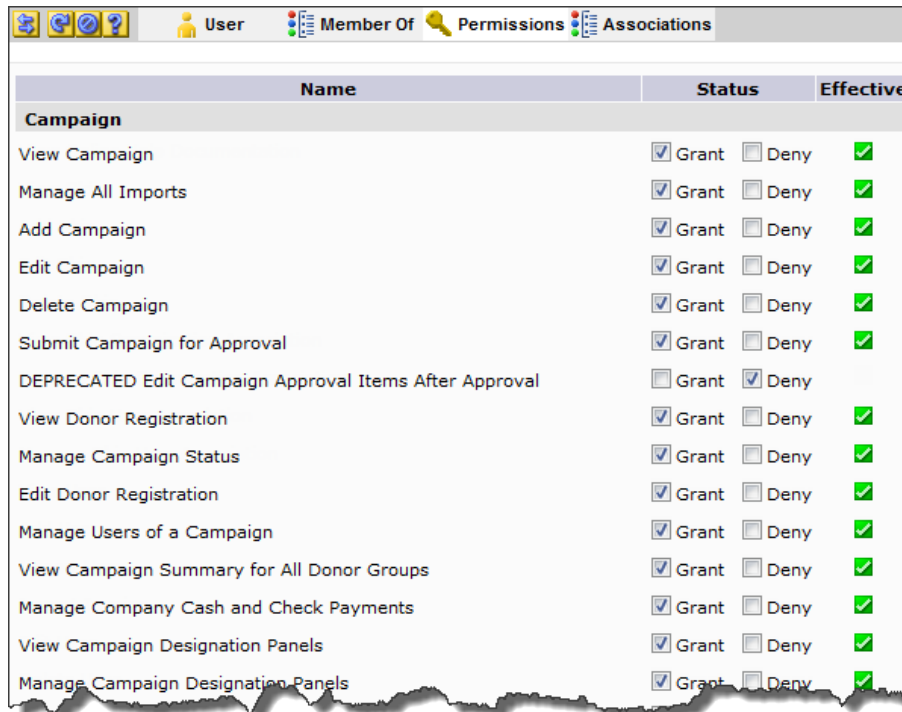


- When a specific user is found, click , located to the right of their profile name. Clicking this will open the user's profile.



- Open the  **Permissions** tab.
- Select the **Grant** box to give the user a specific permission or select the **Deny** box to restrict the user from a specific permission.

**Note:** The permissions available within the  **Permissions** tab depend on the group selected for the user.




Name	Status	Effective
<b>Campaign</b>		
View Campaign	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Manage All Imports	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Add Campaign	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Edit Campaign	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Delete Campaign	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Submit Campaign for Approval	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
DEPRECATED Edit Campaign Approval Items After Approval	<input type="checkbox"/> Grant <input checked="" type="checkbox"/> Deny	<input type="checkbox"/>
View Donor Registration	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Manage Campaign Status	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Edit Donor Registration	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Manage Users of a Campaign	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
View Campaign Summary for All Donor Groups	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Manage Company Cash and Check Payments	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
View Campaign Designation Panels	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Manage Campaign Designation Panels	<input checked="" type="checkbox"/> Grant <input type="checkbox"/> Deny	<input checked="" type="checkbox"/>

- Click  **Save / Update** when complete.

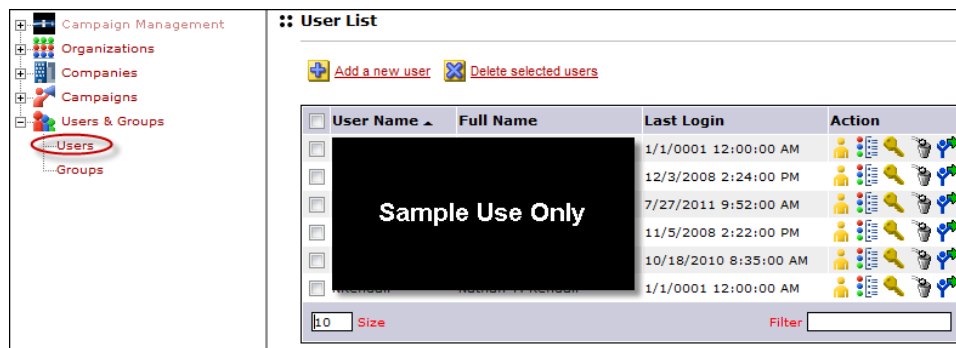


## Associating Users

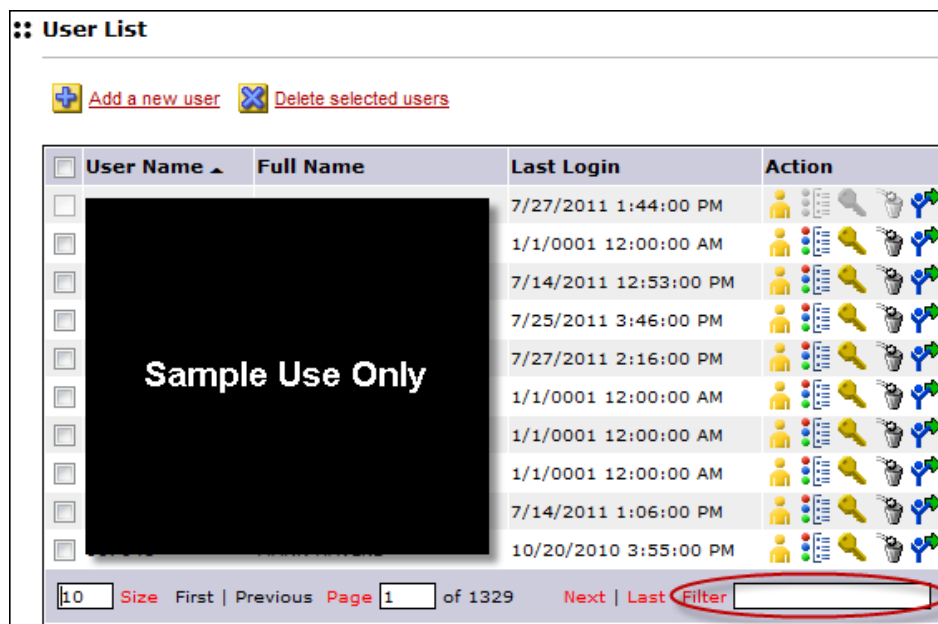
All users within the system must be associated to the organizations, companies, campaigns, donor groups, and websites they need to work with. To manually associate users, take the following steps:

**Note:** If you have just created a new user, and are already in their user profile, in the **Users** section of OPPS, you can skip steps 1-3. After all the new user's required information is entered and saved, the navigation bar across the top of the **User** page will enable, and you will have access to the  **Associations** tab. Click this tab instead of searching for a user through the filtering system.


1. Expand the  **Users & Groups** level of Campaign Management and click **Users**.




2. Search for a user by entering their username, or first and/or last name in the **Filter** field.

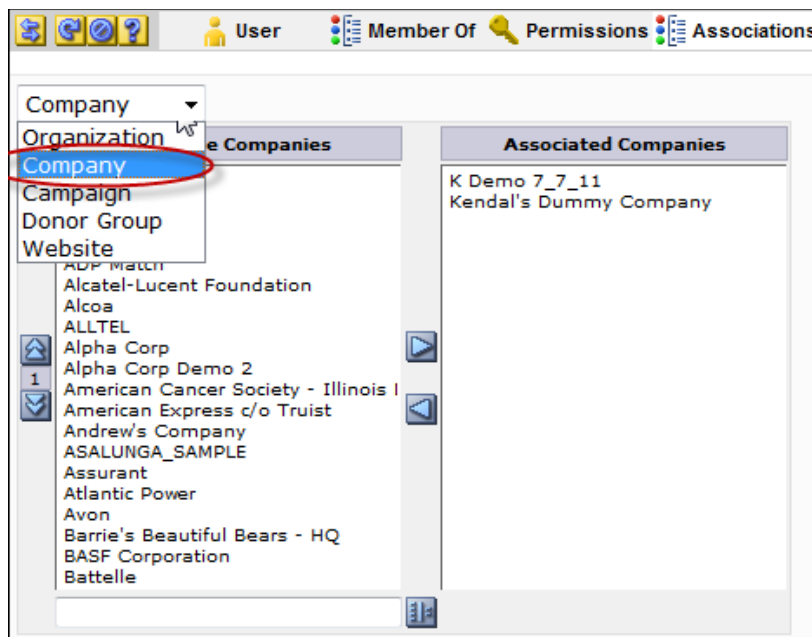







- When a specific user is found, click , located to the right of their profile name. Clicking this will open the user's profile.





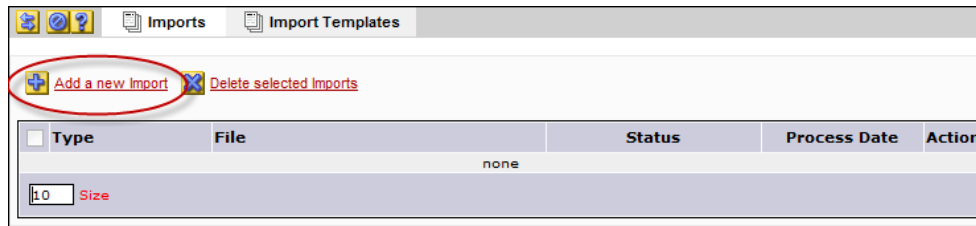
- Open the  **Associations** tab.
- From the dropdown menu, select **"Company."**



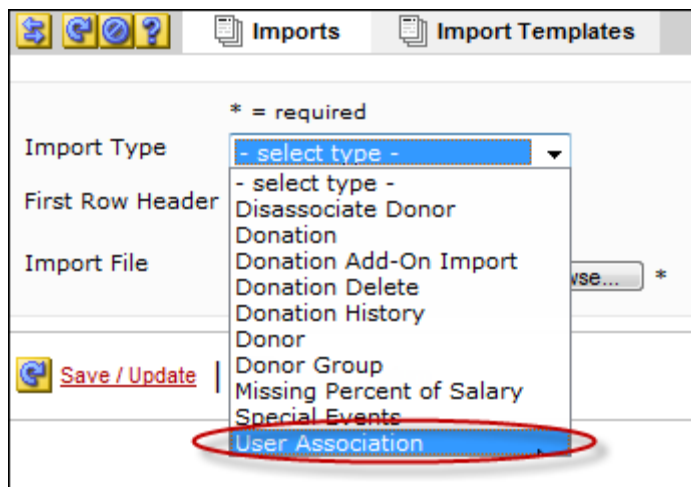
- From the list of available companies, highlight the company the user will work with. To select multiple companies, press and hold the Shift key, while clicking on the name of specific companies in the Available Companies table. Once a company is highlighted, click  to associate the user to the company. If necessary, click  to disassociate the user from a specific company. When complete, click  **Save / Update**.
- Repeat for **"Organization," "Campaign," "Donor Group,"** and **"Website."**

**To upload user associations, perform the following steps:**

- Expand the  **Campaigns** level of OPPS and open your campaign.
- Select **Importing** from the navigation tree.
- Click  **Add a new Import**.



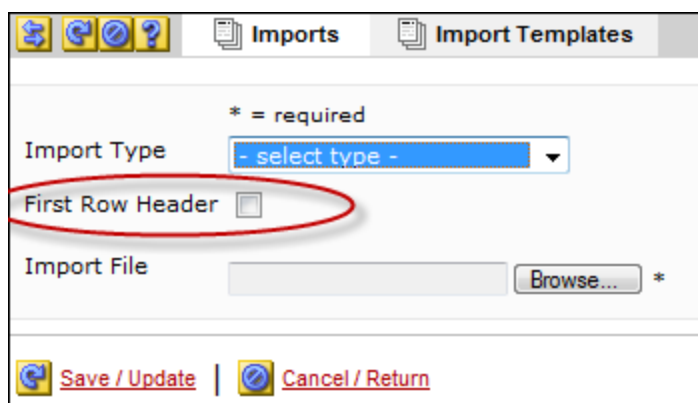
4. Choose “User Association” for the Import Type



5. Click  to upload a file.

**Note:** For file specifications, please refer to the Support Site, at <http://support.truist.com>.

6. Check **First Row Header** if the file contains a header row.



7. Click .




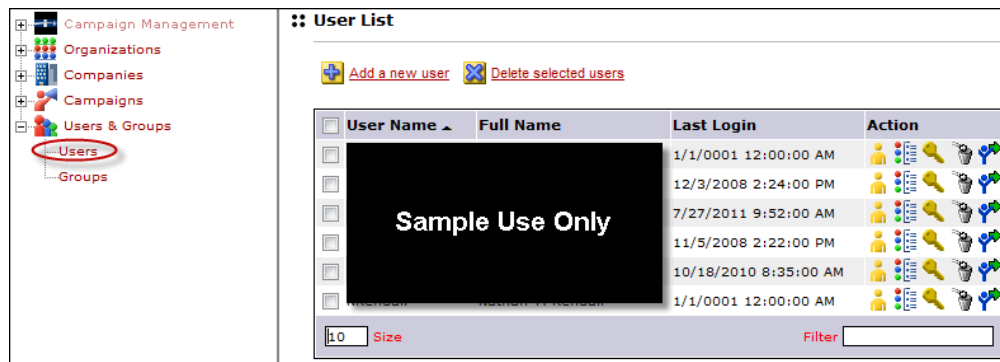
## Deleting Users

On occasion, it may be necessary to delete a user.

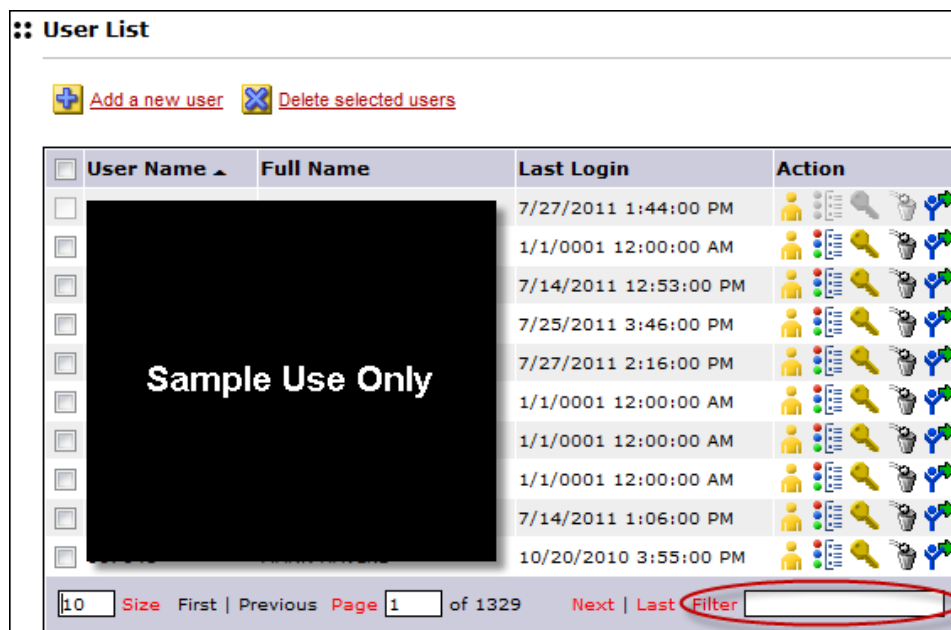
**Note:** As a best practice, verify that users no longer require access to a campaign by reviewing users' activity and their past campaign associations before deleting.


To delete a user, take the following steps:

1. Expand the  **Users & Groups** level of Campaign Management and click **Users**.



2. Search for a user by entering their username, or first and/or last name in the **Filter** field.



3. After a specific user is found, notice there are two methods of deleting a user.
  - a. Click , located to the right of the user profile name.



**:: User List**

[Add a new user](#)
[Delete selected users](#)

<input type="checkbox"/>	User Name ▲	Full Name	Last Login	Action
<input type="checkbox"/>	Sample Use Only		7/27/2011 1:30:00 PM	

Size
 Filter

- b. Or mark the checkbox located to the left of their username, and then click [Delete selected users](#). Note that multiple users can be deleted at once using this method. Simply mark the checkboxes for multiple users and click [Delete selected users](#).

**:: User List**

[Add a new user](#)
[Delete selected users](#)

<input type="checkbox"/>	User Name ▲	Full Name	Last Login	Action
<input checked="" type="checkbox"/>	Sample Use Only		7/27/2011 1:30:00 PM	

Size
 Filter

4. A popup will appear, asking you to confirm that you want to delete the selected user(s). Click "Ok" to confirm this action.





## Groups

The **Groups** section of the **Users & Groups** level contains all of the system's default groups and groups you create in the system. Each group has a unique set of default permissions that grant or restrict access to various areas of OPPS. From here, administrators can add new groups and assign permissions.


### Creating a New Group

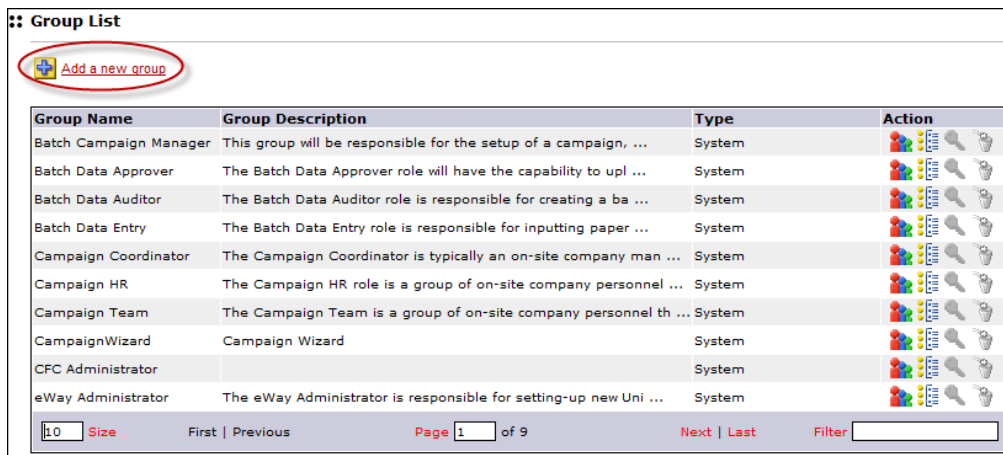
Sometimes, if the default groups do not meet all the needs of your campaign, creating a customized group will be necessary.

To do this, take the following steps:

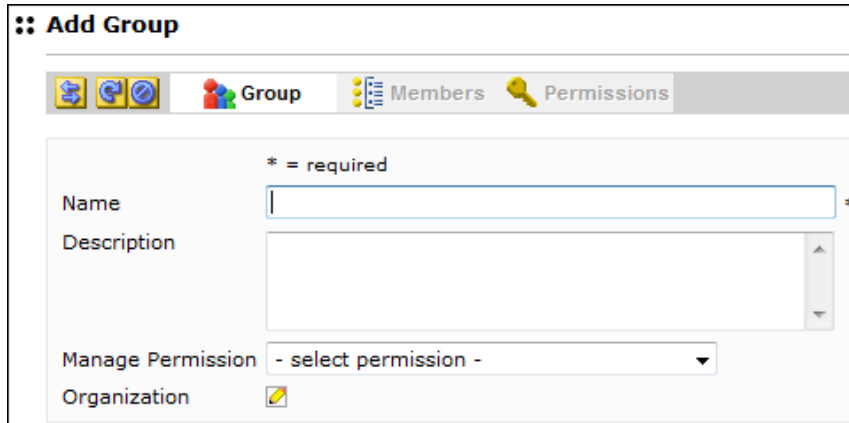
1. Expand the  **Users & Groups** level of Campaign Management and click  **Groups**.



2. Click the  **Add a new group** link.



3. Fill in the appropriate information in the fields provided. Note the **Manage Permission** dropdown; this field allows you to choose which part of the campaign you wish this group to have permission to manage.

4. Click  [Save / Update](#) when complete.


### Assigning Users to Groups

After a new user has been entered into the system they can be assigned to a group. Likewise, after a new group has been entered into the system, administrators can add members. These tasks, although essentially have the same outcome, can be completed in two different ways. Deciding which method to use is up to the administrator; however, usually the best choice is based on the task in store. If a new user has just been created and needs to be assigned to multiple groups, it is sometimes best to assign groups to the user via the **Users** section of Campaign Management. If a new group has just been created and does not have any members, it is sometimes best to add multiple members to the group via the **Groups** section of Campaign Management. Each method is detailed below.

Please note that it is not required to assign users to groups. Making a user a member of a group strictly makes it easier to assign permissions that are most commonly used for your campaign.

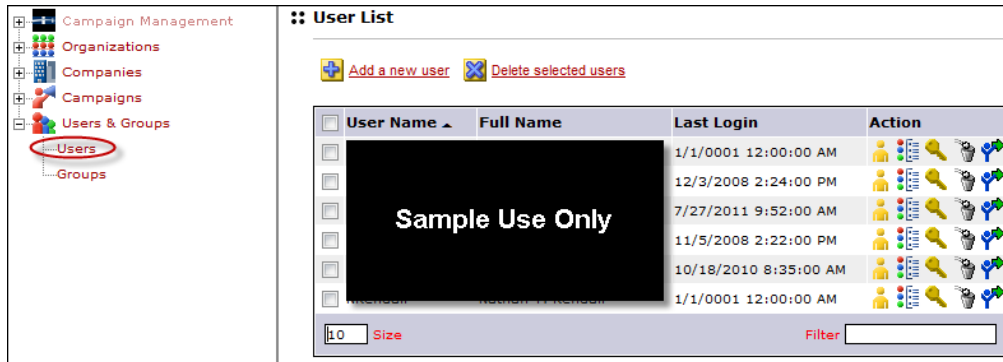
Also note that it is highly recommended you research the permissions assigned to each group you may add a user to. Some groups have conflicting permissions with other groups, which will cause a user error if groups with these conflicting permissions are assigned to a user.

#### To assign multiple groups to a user take the following steps:

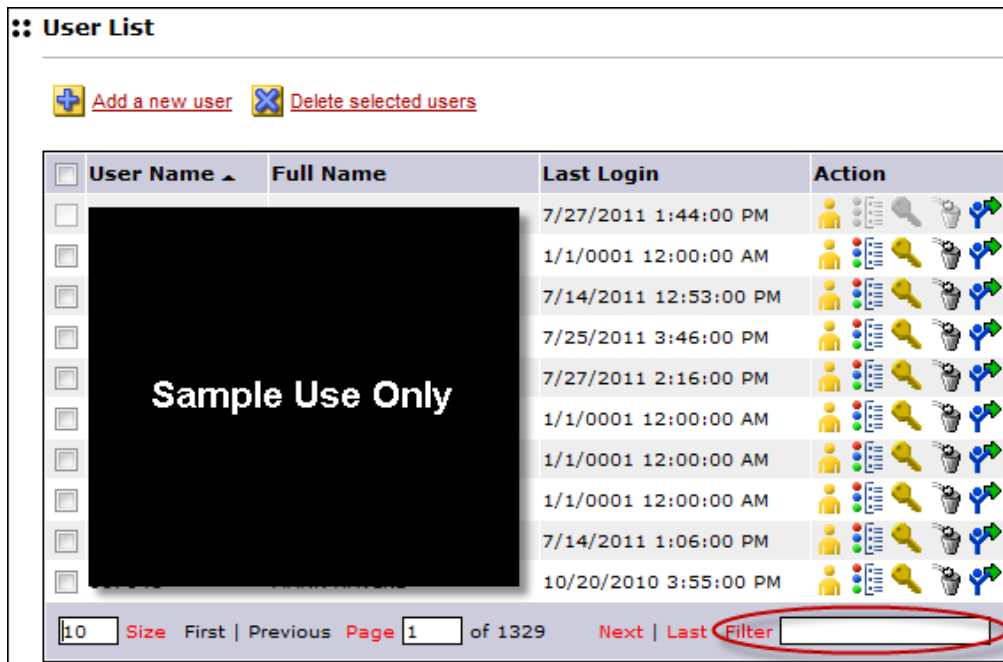
**Note:** If you have just created a new user, and are already in their user profile, in the **Users** section of OPPS, you can skip steps 1-3. After all the new user's required information is entered and saved, the navigation bar across the top of the **User** page will enable, and you will have access to the  **Member Of** tab. Click this tab instead of searching for a user through the filtering system.




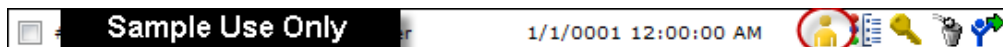
1. Expand the  **Users & Groups** level of Campaign Management and click **Users**.



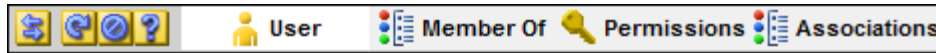
2. Search for a user by entering their username, or first and/or last name in the **Filter** field.



3. When a specific user is found, click , located to the right of their profile name. Clicking this will open the user's profile.

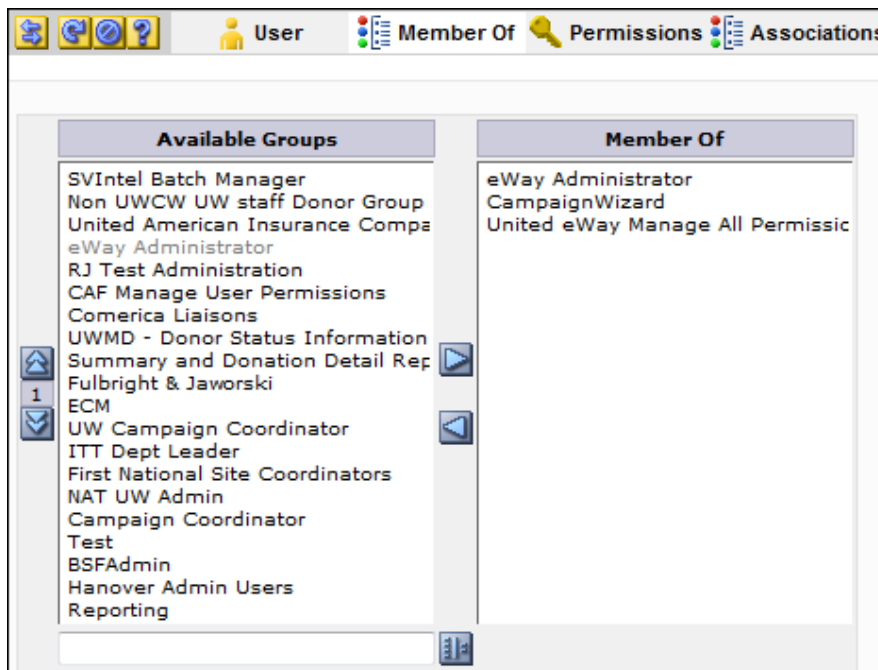


4. Open the  **Member Of** tab.



- From the list of available groups, select groups to assign to the new user. To select multiple groups, press and hold the **Shift** key, while clicking on the name of specific groups in the Available Groups table. Once all groups are selected, click to make the user a member of the selected groups. If necessary, click to remove the user from a specific group. When complete, click [Save / Update](#).

**Note:** Available Groups will vary based upon the groups created in the **Groups** section of the **Users & Groups** level and the permission level of the admin user. For details on creating groups, see the **Creating New Groups** section of this documentation.

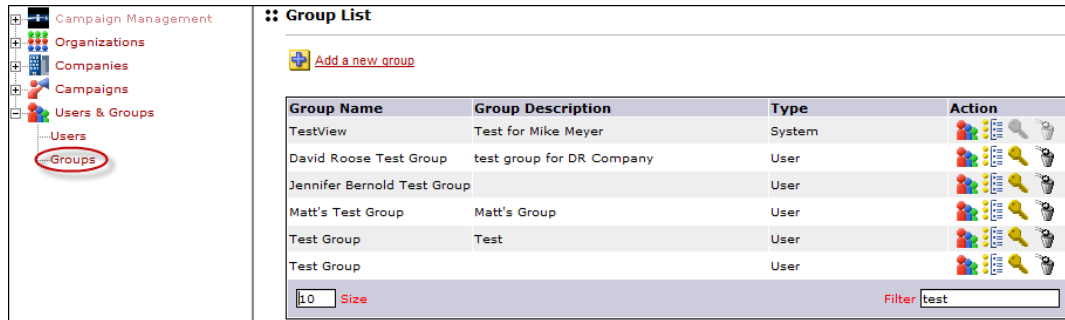


To assign multiple users to a group, take the following steps:

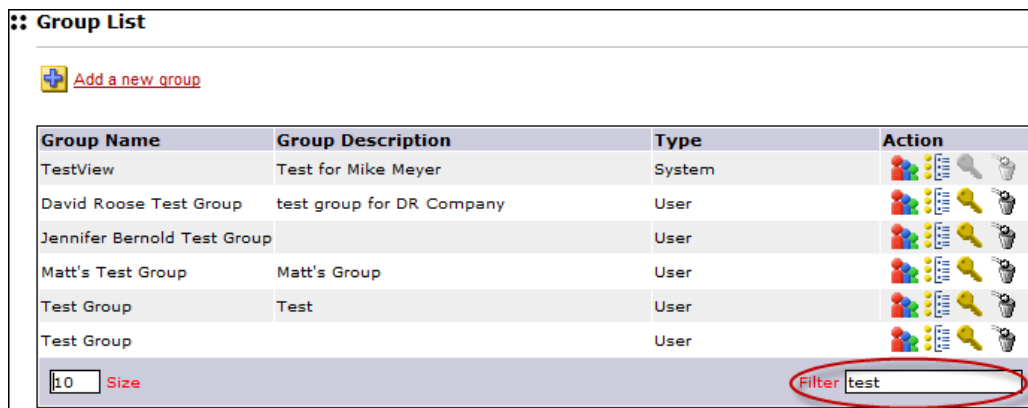
**Note:** If you have just created a new group, and are already in the group’s profile, in the **Groups** section of OPPS, you can skip steps 1-3. After all the new group’s required information is entered and saved, the navigation bar across the top of the **Group** page will enable, and you will have access to the **Member Of** tab. Click this tab instead of searching for a group through the filtering system.



1. Expand the **Users & Groups** level of Campaign Management and click **Groups**.



2. Search for a group by entering the name in the **Filter** field.



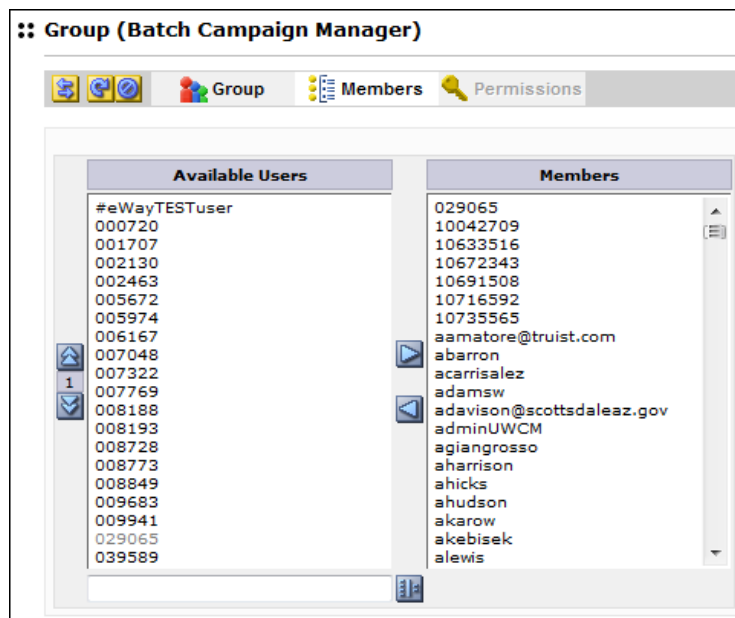
3. When a specific group is found, click , located to the right of the group name. Clicking this will open the group profile.





4. Open the **Members** tab.



5. From the list of available users, select users to assign group membership. To select multiple users, press and hold the **Shift** key, while clicking on the name of specific users in the Available Users table. Once all users are selected, click to make the user a member of the new group. If necessary, click to remove the user from Members. When complete, click **Save / Update**.




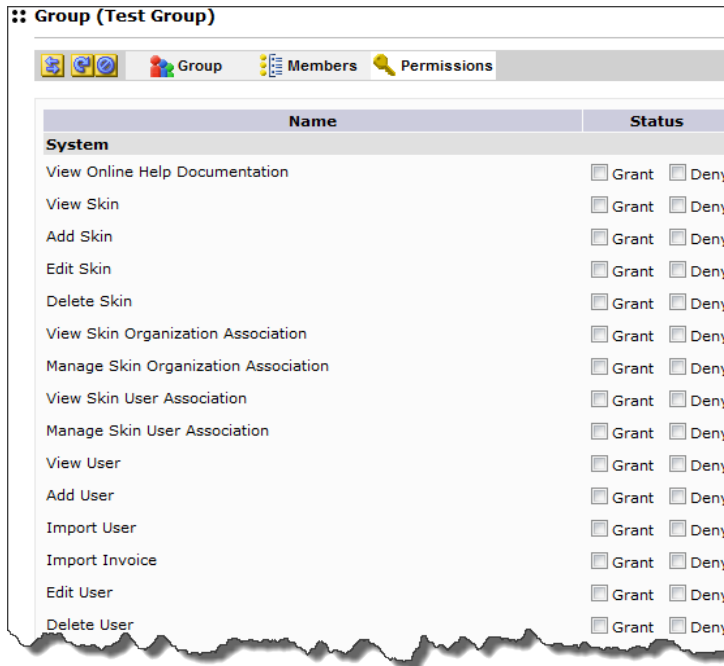
### Assigning Group Permissions

All groups within the system must be assigned permissions in order to allow and restrict users from certain tasks within OPPS. Permissions assigned to a group become the group's default permissions, visible under the  **Permissions** tab, in the **Users** section. From the  **Permissions** tab in the **Groups** section you can check or uncheck various permissions you want to allow for the new group.

See Appendix A for details on each permission category.

To manage group permissions, take the following steps:

1. Open the  **Permissions** tab in the **Groups** section of OPPS.
2. Select the **Grant** box to give the group a specific permission or select the **Deny** box to restrict the group from a specific permission.



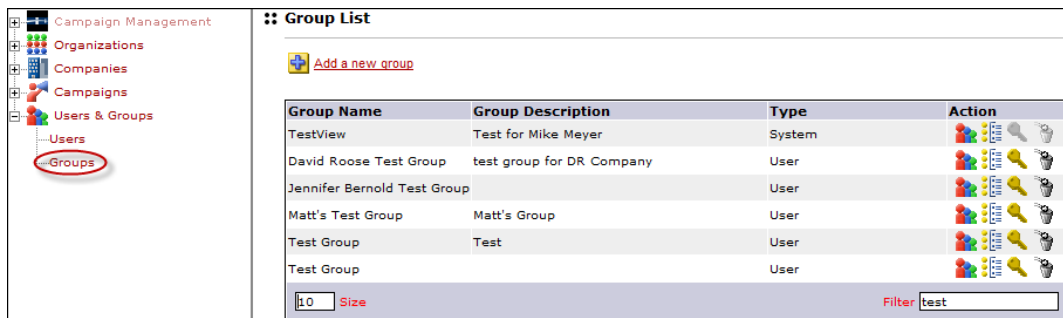
3. Click  **Save / Update** when complete.

## Editing Groups

If permitted by an administrator, all group information may be edited at any time. Modifications are reflected immediately, upon saving.

To edit a group, take the following steps:

1. Expand the  **Users & Groups** level of Campaign Management and click **Groups**.



2. Search for a group by entering the name in the **Filter** field.



**Group List**

[+ Add a new group](#)

Group Name	Group Description	Type	Action
TestView	Test for Mike Meyer	System	
David Roose Test Group	test group for DR Company	User	
Jennifer Bernold Test Group		User	
Matt's Test Group	Matt's Group	User	
Test Group	Test	User	
Test Group		User	

10 Size Filter test

- When a specific group is found, click located to the right of the group name. Clicking this will open the group profile.

Test Group	Test	User	
------------	------	------	--

- Edit information as desired in any of the available fields.

**Note:** Remember to click [Save / Update](#) if you edit information in each tab.

**Group (Test Group)**

[Group](#) | [Members](#) | [Permissions](#)

\* = required

Name  \*

Description

Manage Permission

Organization  Kendal's Dummy Organization

[Save / Update](#) | [Cancel / Return](#)

## Deleting Groups


On occasion, it may be necessary to delete a group.

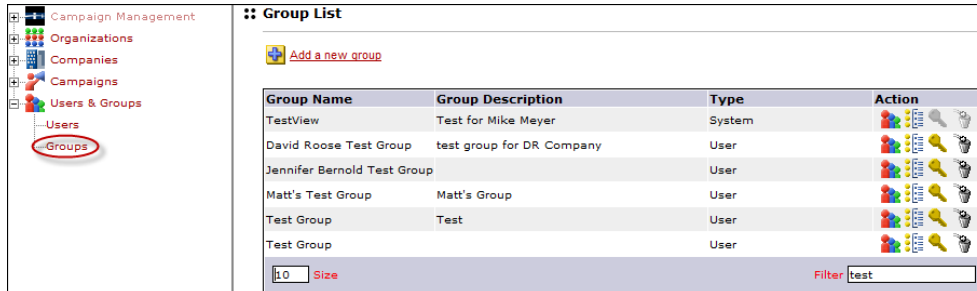
**Note:** Remember to verify that all users associated to the group you plan to delete have all the correct permissions, as the permissions associated to a user via this group will be erased when the group is deleted.



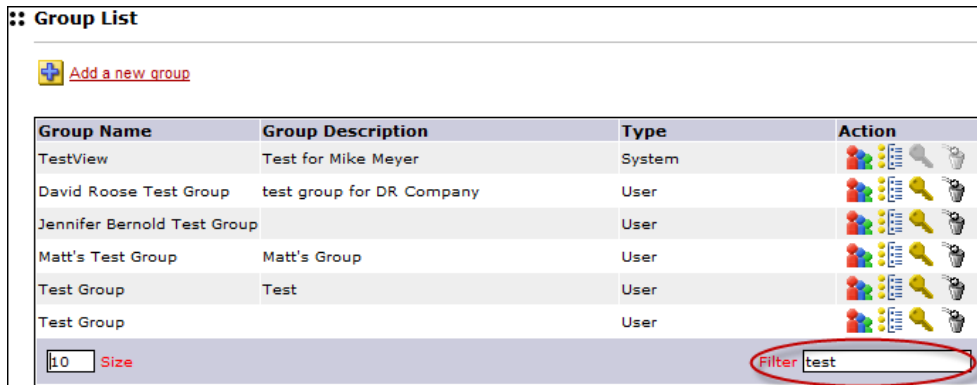


To delete a group, take the following steps:

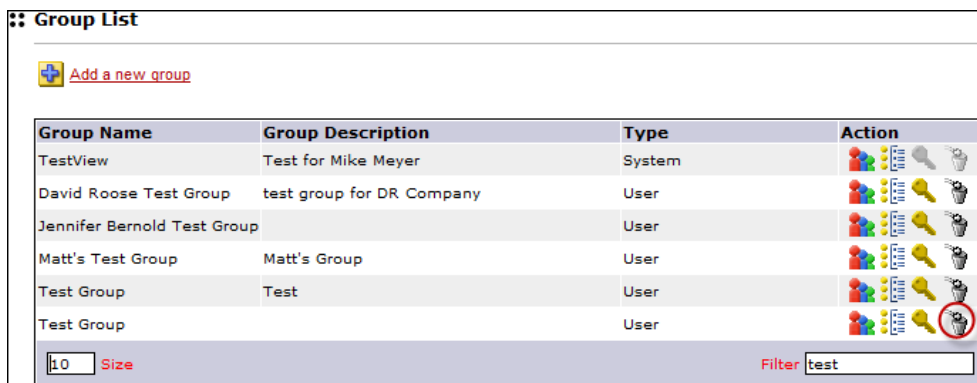
1. Expand the  **Users & Groups** level of Campaign Management and click **Groups**.



2. Search for a group by entering the group name in the **Filter** field.



3. When a specific group is found, click , located to the right of the group name.



4. A popup will appear, asking you to confirm that you want to delete the selected user(s). Click **“Ok”** to confirm this action.



## Appendix A: Permission Categories

### **System**

The permissions in the **System** category grant or restrict users from accessing areas specific to the Campaign Management system. This includes items such as the links available on the page, skins, users and group settings and permissions, etc.

### **Campaign Management**

The permissions in the **Campaign Management** category grant or restrict users from accessing areas specific to the Campaign Management level. This includes items such as the ability to approve campaigns, view logs, edit agency users, etc.

### **Organization**

The permissions in the **Organization** category grant or restrict users from accessing areas specific to the Organization level. This includes items such as editing organization information, managing the organization agencies, designation panels, option packages, etc.

### **Company**

The permissions in the **Company** category grant or restrict users from accessing areas specific to the Company level. This includes items such as editing company information, managing coordinator levels, dashboard, etc.

### **Campaign**

The permissions in the **Campaign** category grant or restrict users from accessing areas specific to the Campaign level. This includes items such as editing campaign information, adding special events, approving and rejecting batches, etc.

### **Matching Gift**

The permissions in the **Matching Gift** category grant or restrict users from accessing areas specific to Matching. This includes items such as editing matching grant buckets, ceilings, option sets, etc.

### **Matching Gift Website**

The permissions in the **Matching Gift Website** category grant or restrict users from accessing areas specific to the Matching Website. This includes items such as editing the matching grant website, website programs, website content, etc.

### **Donor Group**

The permissions in the **Donor Group** category grant or restrict users from accessing areas specific to Donor Groups. This includes items such as editing the donor groups, donor group contacts, designation panels, manage users of a donor group, etc.



### **Website**

The permissions in the **Website** category grant or restrict users from accessing areas specific to the donor site. This includes items such as editing website content, news and events, designation panels, etc.

### **Donor**

The permissions in the **Donor** category grant or restrict users from accessing areas specific to the donors. This includes items such as adding or updating donors, deleting a donor's donation, impersonating donors, etc.

### **Campaign Management Reporting**

The permissions in the **Campaign Management Reporting** category grant or restrict users from accessing general Campaign Management reporting. This includes running items such as invoice exports, survey summaries, agency exports, etc.

### **Organization Reporting**

The permissions in the **Organization Reporting** category grant or restrict users from accessing reporting specific to the Organization level. This includes running items such as the organization's campaign summary reports, organization reporting delivery, agency mapping exports, etc.

### **Campaign Reporting**

The permissions in the **Campaign Reporting** category grant or restrict users from accessing reporting specific to the campaign level. This includes running items such as donor detail reports, write-in exports, agency designation exports, etc.

### **Tools**

The permissions in the **Tools** category grant or restrict users from accessing areas specific to various tools within the system. This includes tools such as copying a campaign, deploying a campaign, mass deleting password history, etc.