

Partner Permissions

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Partners and partner managers are granted access to activities by either

1. being assigned a role with the activity on the activity overview page or
2. the partner and the activity sharing the same organization.

Method 1:

On the activity overview page, all partners and partner managers listed under the "Staff Roles and Partner Access" section have access to the activity.

The screenshot shows the 'We Care' activity overview page for LOVE International. The page has a top navigation bar with 'Dashboard', 'Activities', 'Results', 'Calendar', 'Documents', 'Photos', and 'Administration'. Below this is a breadcrumb trail: 'Home > Activities > We Care'. The main header area includes the 'We Care' title and 'LOVE International' logo. A secondary navigation bar contains tabs: 'Overview', 'Performance', 'Budget', 'Geography', 'Checklists', 'Forms', 'Documents', 'Calendar', 'Photos', 'Discussion', and a 'History' link. The 'Staff Roles and Partner Access' section is a table with the following data:

	Person	Role	Title	Organization	Permissions	
	Jeanne Bell	Technical Lead	Program Management Advisor		Owners	Details
	Katherine Adams	Facilitator	Education Team Leader		Managers	Details
	Lamine Diakhate	COP	Regional Community Program Manager	LOVE International	Partners	Details
	Nevaeh Motahari	Data Specialist	Inter-Agency Strategic Information		Users	Details
	Sean Stewart	Supervisor	Program Assistant		Users	Details
	Wyatt Turner	Technical Assistance	Senior Strategic Information Advisor		Users	Details
	Click to add...					

Method 2:

Partners and partner managers also gain access to their activities by being assigned to the managing organization for their activities. For example, if the organization:

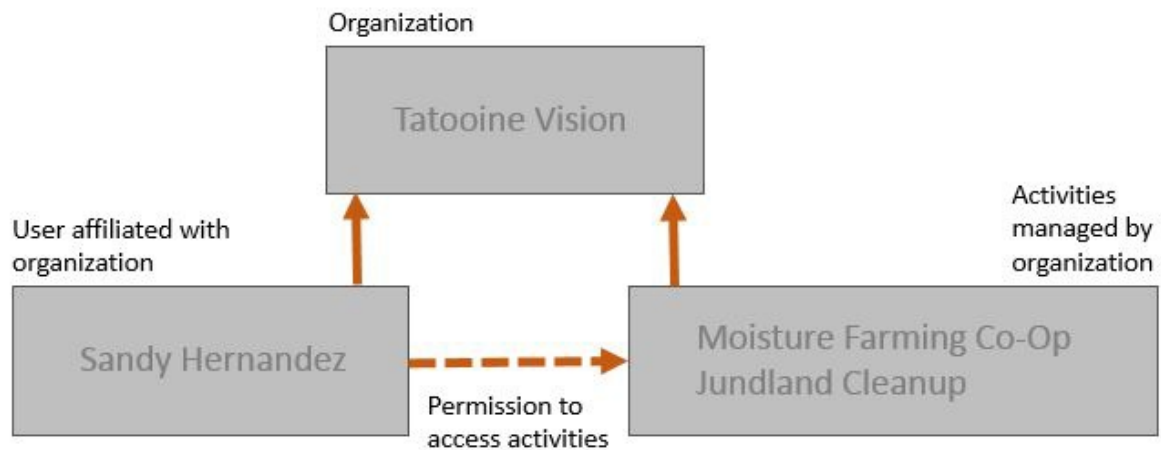
Tatooine Vision

manages the activities:

Moisture Farming Co-Op and

Jundland Cleanup,

then users affiliated with Tatooine Vision will have access to Moisture Farming Co-Op & Jundland Cleanup.




To see/edit a partner user's organization affiliation, go to Administration > People > Users > *select user*. Their permission level should be "Partner" or "Partner Manager".

Dashboard Activities Results Calendar Documents Photos **Administration**

Home > Administration > People > Users > Sandy Hernandez [Impersonate this user](#)

Sandy Hernandez

Photo



[Change photo](#)

Contact Details

Name

Email

Job title

Organization **Tatooine Vision** [Choose different organization](#) [Edit contact info](#)

Department

Work Phone

Permissions

☐ **Managers** Can mark checklist items as approved. Can sign off on results data submitted by partners.

☐ **No Access** Cannot log into the system.

☐ **Owners** Can configure the system's global settings and lists. Can manage user accounts and logins, reset passwords, and assign permissions.

☒ **Partner Managers** Can manage users for their organization and also edit information for their organization's activities

☐ **Partners** Users from other organizations with limited access to activities they implement.

☐ **Users** Can log into the system to manage activities.

☐ **Viewers** Can log into the system, browse activities, and view reports. Cannot change anything.

Password ☒ This person has a password. [Assign new password](#)


In this example, Sandy will have Partner Manager-level access to all of Tatooine's activities. These activities are visible on the organization's page at Administration > People > Organization > *select organization*.

Dashboard Activities Results Calendar Documents Photos **Administration**

Home > Administration > People > Organizations > **Tatooine Vision** [Change History](#)

Tatooine Vision

Organization

Name Tatooine Vision 

Short Name TV

Phone +8493 344-325-2345

Fax +8493 344-325-2346


Address Outer Rim Territories, Arkanis Sector

City Mos Espa

Country United States Minor Outlying Is ▼

Website <http://starwars.wikia.com/wiki/Tatooine>

Tags

Tags  Foundation

Add a tag...

Activities

- Jundland Cleanup
- Moisture Farming Co-Op

Users

- André Dieudonné
- Sandy Hernandez
- Scott Carlos

Notes

Notes on this organization.

Activities are affiliated with organizations on the Activity Overview page (Activities > *select activity* > Overview tab > Partner Organization section. You can view or edit this information here.

Dashboard **Activities** Results Calendar Documents Photos

Home > Activities > **Jundland Cleanup**

Jundland Cleanup

Tatooine Vision

Overview Performance Budget Locations Checklists Forms

Partner Organization

Organization Info 

Tatooine Vision
+8493 344-325-2345
+8493 344-325-2346
Outer Rim Territories, Arkanis Sector
Mos Espa

 Choose different organization  Edit contact info

In the definition of a user group's permission levels, access is restricted to the user's organization's activities by clicking on "Partner" at the bottom of the page. Clicking on "Partner Manager" simply gives that user group the ability to submit data at the end of a

reporting period. You can [edit the permissions of each group](#) if needed.

DashboardActivitiesResultsCalendarDocumentsPhotosAdministration

Home > Administration > People > Groups > Partner Managers

Partner Managers

PermissionsMembersChange History

Other Roles

☐

Checklist Approver

Can mark tasks as approved in activity checklists

☐

Results Data Approver

Can approve results data submitted by partners

☒

Partner

Can only edit information for their organization's activities

☐

Translator

Can view and edit text translations

☐

No Access

Cannot log into the system

☒

Partner Manager

Can manage users for their organization and also edit information for their organization's activities

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