Permissions Overview

DevResults manages access using permissions groups. In plain English:

- Users are assigned to a single group.
- A group is defined with an access level for each part of the site.

This makes it easy to see a user's permission and to update permissions quickly for a type of user. As soon as you add or remove permissions from the group, permissions are updated for all users in the group.

This page includes information about:

- **Permissions groups**
- **Permissions categories**
- **Partner permissions**
- **Editing permissions**
- **Deleting users**
- **Special permissions for owners**

> **Note:** Permissions for **internal** user groups (groups without the "partner" designation) apply to all projects, indicators, etc. It is not possible to grant access to some indicators and projects but not others.
>
> In contrast, access for **partners** and **partner managers** is automatically limited to their projects, indicators, data, documents, etc. **Learn more** about how partners gain access to projects.

Permissions Groups

Every site comes pre-built with several permissions groups. You can edit the permissions for these groups or create additional groups:

- **Owners**: Can configure the system's global settings and lists. Can manage user accounts and logins, reset passwords, and assign permissions.
- **Managers**: Can mark checklist items as approved. Can sign off on results data submitted by partners.
- **Partner Managers**: Can manage users for their organization and also edit information for their organization's projects
- **Partner Contributors**: Users from other organizations with limited access to projects they implement.
- **Contributors**: Can log into the system to manage projects.
- **Viewers**: Can log into the system, browse projects, and view reports. Cannot change anything.
- **No Access**: Cannot log into the system. (Generally used when users have left your organization.)

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Permissions Categories

For each group, permissions are defined for each part of DevResults:

- Project Discussions -- grants users access to discussion boards
- Project Forms -- grants users access to project and project reporting period forms
- **Project Overview** -- grants users access to project name, descriptive fields, status, mechanism, dates, sectors, tags, and assignments to reporting periods, indicators, organizations, users, and geographies.
- Mechanism Manager -- grants users access to the global mechanism list
- Sector Manager -- grants users access to the global sector list
- Calendar -- grants users access to calendars of events
- Checklists -- grants users access to checklists and milestones
- Custom Queries -- grants users view and download access to custom query results
- Data Table Contributor -- grants users access to data table data
- Data Table Manager -- grants users access to data table design
- Diagnostics -- grants users access to site diagnostics
- Documents -- grants users access to document libraries
- Embed Codes -- grants users access to dashboard tile embed code
- Financial -- grants users access to budgets, funding sources, expenses and disbursements
- **Geographic Information** -- grants users access to locations and administrative divisions
- Groups -- grants users access to user permission groups
- **Indicator Definitions** -- grants users access to indicator name, descriptive fields, definition fields, disaggregations, classifications, indicator forms, and assignments to projects
- **Indicator Results** -- grants users access to indicator data
- Indicator Targets -- grants users access to indicator targets
- Organizations -- grants users access to organizations and organization types
- People -- grants users access to individual user's name, email, organization details, and assignment to projects
- Photos -- grants users access to photo galleries
- Settings -- grants users access to system configuration, system announcements, custom fields, change history, checklist templates, form templates, logic checks, and API keys
- **Reporting Periods** -- grants users access to reporting cycles and reporting periods
- Status Option Manager -- grants users access to the global status option list

For each category, you can assign one of three levels of access:

- View & Edit
- View
- No Access

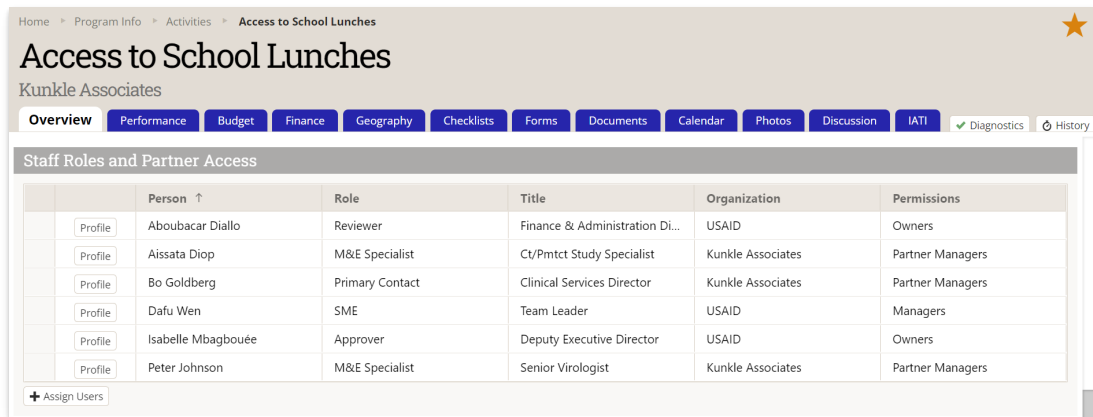There are additional roles for each group with a yes/no checkbox:

- Checklist Approver -- can mark tasks as approved in project checklists
- Dashboard Manager -- can push dashboards to other users and set default for new users
- Deliverable Approver -- can approve deliverables
- No Access -- cannot log into the system
- Owner -- can see/edit all objects, edit approved/locked data, impersonate users, manage integrations, and more; use only for site administrators
- Partner Manager -- can manage users for their organization and edit their organization's details
- Partner -- can only access information for projects they are assigned to
- Results Data Approver -- can approve indicator data submitted by partners
- Submit Indicator Results -- can submit indicator data for approval

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Partner Permissions

Partners are users who belong to a permission group with either the "partner" or "partner manager" role checked. Partners are granted access to individual projects when they are assigned to a project. Partners can be assigned to projects:

- On the user's profile page (**Administration > Users >** *select user*), or
- On each project's overview tab in the **Staff Roles and Partner Access** section.

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Editing Permissions

For instructions on how to add a user to a group or change their group, see **Change a User's Permission Group**.

To edit permissions for a group, see **Change a Group's Permissions**.

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Deleting Users

What happens when you delete a user?

- No indicator results, indicator result comments, narrative responses, discussion posts, photos, documents, or calendar events are affected.
- The user is unassigned from all projects and will no longer appear in the "Staff Roles and Partner Access" section on any project page.
- Discussion posts still show the name of the user who posted it, even if that user has been deleted.
- The user's dashboards are not deleted. The owner of the dashboard is shown as blank, and dashboard managers can give the dashboard a new owner if desired.
- The user's name is removed from checklist item assignments and the item can be re-assigned to another user.
- The user's name is removed from deliverable approvals and checklist completion approvals, but the date remains.
- The user's changes are included in the change history log, but the user is removed from the left-hand user filter.
- If the user is re-added to the site (using the same email address):
    - The user is **not** re-assigned to the projects they were previously assigned to.
    - The user's dashboards are re-enabled for them, if they haven't been transferred to another user.
    - The user's checklist items are re-assigned to them.
    - The user's name is again displayed for deliverable approvals and checklist completion approvals.
    - The user is re-added to the left-hand user filter in the change history log and all of their previous changes will

be filterable.

- Users are not erased from the DevResults database behind the scenes, because they might have access to a different DevResults site. If you need all personal information about a user wiped from the DevResults database and its backups, please see our **article about GDPR**.

Alternatively, you have the option of **changing a user's permission group** to **No Access** instead of removing them from the site if you'd like to have a record of previous users. A user with no access cannot log in, but no other changes are made in DevResults.

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Special permissions for owners

The **Owner** role for a group grants special permissions that (unless otherwise noted) are unrelated from any other permission that you can define for a group.

These permissions consist of the ability to:

- Visit the Merge Duplicate Locations page
- Visit the Bulk Imports page
- Visit the Notifications page
- Visit the IATI page
- View the User Guide
- Add users to owner groups
- Remove users from owner groups
- Manage permissions of owner groups
- Add the owner role to a non-owner group
- View/run all custom queries assigned to the instance
- Change what other groups can run individual custom queries
- Delete other users' saved reports
- Change the owner of a saved report
- Manage authentication providers

- Import data into locked project-reporting periods
- Edit data in locked project-reporting periods
- View the projects that a user can access
- Export project-reporting period discussion board comments (via the manifest)
- Delete data table data by import
- Delete data tables with locked rows
- Modify/delete data in locked rows
- Bulk delete data from data tables
- Impersonate other (non admin) users
- Set the default dashboard for users (users with **edit** on **Program Settings** can also do this)
- Push dashboards to users (dashboard managers can also do this)
- Delete logic checks
- Enable google drive document integration (must also be a beta tester)
- Enterprise permissions (for DevResults sites that publish to other DevResults sites):
  - Change the status of any non-certified project-reporting period
  - Edit group membership across the enterprise

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