LGL Roles and Permissions

By default, there are three roles: Administrators, Fundraisers, and Volunteers. The details of how permissions work with each role are listed in detail in the tables below, but the basic philosophy is as follows:

- **Volunteers** have limited access. They can:
  - See all constituents
  - Add a few kinds of records
  - Edit only records they have created or which are directly assigned to them
- **Fundraisers** can:
  - View almost everything
  - Add most kinds of records
  - Edit records they have permission to view (with a few exceptions) and delete records they have created
- **Administrators** can view, add, edit, and delete every kind of record in LGL.

In addition to the general role-level settings, viewing permissions can be restricted for tasks, documents, contact reports, notes, comments, and mailings/letters.

Volunteers

Record Type	Permissions
Constituent	• Add new records, edit records basic information (name and contact info, etc.)
Contact reports	• View/edit all contact reports with access permission = "Everyone", as well as any created by the volunteer. • Add new contact reports. • Delete is not available.
Tasks	• View and edit all tasks with access permission = "Everyone", as well as any that are assigned to or created by the volunteer. • Add new tasks. • Delete own tasks.
Documents	• View and edit all documents with access permission = "Everyone", as well as any created by the volunteer. • Add new documents. • Delete own documents.
Notes	• View all notes with access permission = "Everyone", as well as any created by the volunteer, or attached to an activity assigned to the volunteer. • Add new notes. • Edit own notes. • Delete is not available.
Comments	• View all comments with access permission = "Everyone", as well as any created by the volunteer, or attached to an activity assigned to the volunteer. • Add new comments to items where access is permitted. • Edit own comments. • Delete is not available.
Goals	• View and edit assigned goals.
Stewards	• View only.

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Record Type	Permissions
Groups and Tags	• View only
Rating and Interest	• No access
Relationship	• No access
List Manager	• No access
Campaigns, Funds, Appeals, and Events	• No access
Gifts and Pledges	• No access
Mailings	• No access
Exports	• No access
Imports	• No access
Team Members	• View only • Edit own profile
Account Settings	• No access

Fundraisers

Record Type	Permissions
Constituent	• Add new records, edit a record's basic information (name and contact info, etc.). Delete is not available.
Contact reports	• View/edit all contact reports with access permission = "Admins and Fundraisers", as well as any created by the fundraiser. • Add new contact reports. • Delete is not available.
Tasks	• View and edit all tasks with access permission = "Admins and Fundraisers", as well as any assigned to or created by the fundraiser. • Add new tasks. • Delete is not available.
Documents	• View and edit all documents with access permission = "Admins and Fundraisers", as well as any created by the fundraiser. • Add new documents. • Delete own documents.
Notes	• View all notes with access permission = "Admins and Fundraisers", as well as any created by the volunteer, or attached to an activity assigned to the volunteer. • Add new notes. • Edit own notes. • Delete is not available.
Comments	• View all comments with access permission = "Everyone", as well as any created by the volunteer, or attached to an activity assigned to the volunteer. • Add new comments to items where access is permitted. • Edit own comments. • Delete is not available.

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Record Type	Permissions
Goals	• View all. • Add new goals. • Edit own goals. • Delete is not available.
Stewards	• Full access (view/add/edit/delete)
Groups and Tags	• Full access (view/add/edit/delete)
Rating and Interest	• Full access (view/add/edit/delete)
Relationship	• Full access (view/add/edit/delete)
List Manager	• View all lists. • Add new lists. • Edit and delete own lists.
Campaigns, Funds, Appeals, and Events	• View only
Gifts and Pledges	• View only
Mailings	• Full access (view/add/edit/delete)
Exports	• Full access (view/add/edit/delete)
Imports	• No access
Team Members	• View only. • Edit own profile.
Account Settings	• No access

Administrators

Administrators have full access to all areas of LGL.

Record Type	Permissions
Constituent	• Full access (view/add/edit/delete)
Contact reports	• Full access (view/add/edit/delete)
Tasks	• Full access (view/add/edit/delete)
Documents	• Full access (view/add/edit/delete)
Notes	• Full access (view/add/edit/delete)
Comments	• Full access (view/add/edit/delete)
Goals	• Full access (view/add/edit/delete)
Stewards	• Full access (view/add/edit/delete)
Groups & Tags	• Full access (view/add/edit/delete)
Rating & Interest	• Full access (view/add/edit/delete)
Relationship	• Full access (view/add/edit/delete)
List Manager	• Full access (view/add/edit/delete)
Campaigns, Funds, Appeals & Events	• Full access (view/add/edit/delete)
Gifts & Pledges	• Full access (view/add/edit/delete)
Mailings	• Full access (view/add/edit/delete)

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Record Type	Permissions
Exports	• Full access (view/add/edit/delete)
Imports	• Full access (view/add/edit/delete)
Team Members	• Full access (view/add/edit/delete)
Account Settings	• Full access (view/add/edit/delete)

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