



GiftWorks Security

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Introduction

GiftWorks now provides several security options to meet the varying needs of every GiftWorks user. Carefully review this guide and consider which security option is right for your organization. When you're ready to set your security options, this guide will give you all the details you need to keep your GiftWorks information safe.

Security Levels Overview

GiftWorks offers security options in three different levels. Each security level provides different levels of access to and use of GiftWorks.

- **Basic Security**
In this security level any user can sign in to start working with GiftWorks. If you set an Administrative password, other users will not be able to access any database settings other than to change the username.

- **Standard Security**
In this security level only users created by the administrator are allowed to sign in to GiftWorks. Passwords are required for all users to sign in and the account must be activated prior to sign in. Users are designated as Standard or Administrator users. Any user can be designated as an Administrator and the Administrator can modify all settings. Standard users still have access to all other areas of the GiftWorks database. You can also manage user accounts and change security levels.

- **Advanced Security**
In this security level every user must sign in with a password and each user is assigned a role. Each role is assigned certain features in GiftWorks that users in that role may access. In addition to managing user accounts and roles, you can change security levels and control direct database access.

Basic Security

GiftWorks Standard and 2008 Premium are initially set to Basic Security. The security options available in Basic Security are the same whether you are working in GiftWorks Standard or 2008 Premium.

SECURITY

Select any of the following to manage your user account and protection levels.



Set or Change Administrative Password

Protect the Features available to administrators with a password.



Remove Administrative Password

To remove administrative password, type in the new one.



Manage User Accounts

See all users who access the database that's currently in use. If you are authorized, you can add, edit, or delete user accounts.

PREMIUM

Basic Security has the following options:

Set or Change Administrative Password

Remove Administrative Password

Manage User Accounts

Set or Change Administrative Password

You may want to protect the GiftWorks settings you use to manage your database. Settings include your custom fields and values, accounting settings, and database backup settings. Enter an administrative password and hint to sign in to GiftWorks and to protect the database settings. Users still have access to all other areas of the GiftWorks database but will not be able to change the settings without the administrative password.

SET ADMINISTRATIVE PASSWORD

This password is case sensitive, so be sure to type it exactly the same way every time.

Type your new password:

Type the new password again to confirm:

If your password contains capital letters, be sure to type them the same way every time you enter it.

Type a word or phrase to use as a password hint:

PLEASE NOTE: Your password hint will be visible to everyone who uses GiftWorks.

HELPFUL TIP:















As you consider your security options, you may want to designate a person in your office as the overall GiftWorks administrator. You may also want to create a security standards guide and note the Administrative Password.

Manage User Accounts

MANAGE USER ACCOUNTS

The list below shows the current users for this database. Click on a user to see the options for managing the account.

User Accounts

 James Williams	Active 
Last Sign-in: 11/9/2007 9:02:02 AM	Change name
 Sarah Jones	Active 
 Adam Lawrence	Active 
 Rick Samson	Active 
 Sample User (Me)	Active 
 Cindy Smith	Active 
 Sandy Jackson	Active 

The only option you have to manage user accounts in Basic Security is to change the user's name. Usernames can not be deleted and are used to track history as information is added or changed.

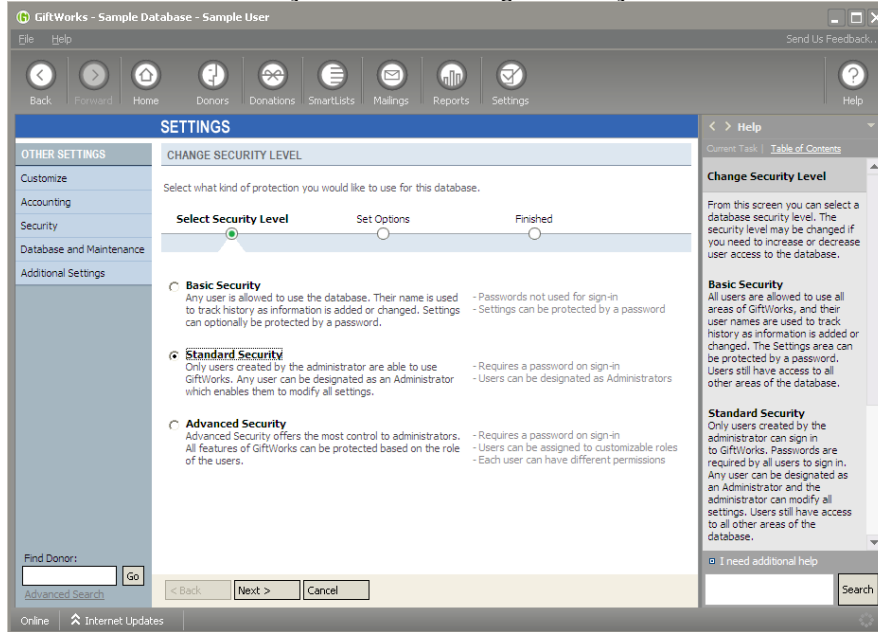
HELPFUL TIP:

Basic Security might be the right security level if you have few database security requirements.

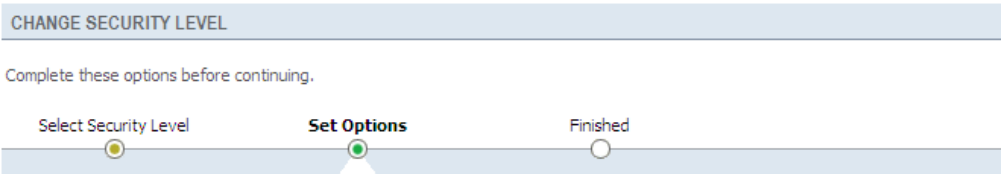
Standard Security

GiftWorks Premium users have additional security options in the Standard and Advanced Security levels.

To change the security level from Basic to Standard, click on the Settings section at the top and then click on the Security link or the Change Security Level link.



Select Standard Security and click on Next to continue.



To change to this security level you will be made an administrator. You will also need to create a password for yourself.

Type your new password:

Type the new password again to confirm:

If your password contains capital letters, be sure to type them the same way every time you enter it.

Type a word or phrase to use as a password hint:

The password hint will be visible to everyone who uses GiftWorks.















When you change the database security level from Basic to Standard, you will be made an administrator. Enter your password and hint and then click Change. From there you will be able to manage user accounts and change security levels.

Manage User Accounts in Standard Security

MANAGE USER ACCOUNTS

The list below shows the current users for this database. Click on a user to see the options for managing the account. The options for managing user accounts depends on the [Security Level](#) for this database.

User Accounts

 James Williams Active 
Type: Standard User Change Change name Reset password
Last Sign-in: 5/20/2008 11:15:47 AM Delete account Disable account
 Sarah Jones Disabled 
 Adam Lawrence Disabled 
 Rick Samson Disabled 
 Sample User (Me) Active 
 Cindy Smith Disabled 
 Sandy Jackson Disabled 

[Add a new user account.](#)


In Standard Security, you can change the user type, add a new user account, change the user name, set the password, activate/disable or delete a user account. Click on the user account you want to manage and then select the link for the option you want to manage.

User Type

Users in the Standard Security setting can be designated as a Standard User or as an Administrator.

CHANGE USER TYPE

Select the type for this user.


 James Williams	<input checked="" type="radio"/> Standard User Standard Users cannot change settings but have full control over other areas of GiftWorks.
	<input type="radio"/> Administrator Administrators have complete access to all settings and can make any desired change.

Standard Users can access all areas of GiftWorks except the administrative options in the Settings section.

When a Standard User selects the Settings section at the top, the only settings option for the Standard User is to change the user name and password. Click on Change Your User Settings and select Change User Name or Change User Password to continue.

GIFTWORKS SETTINGS

Choose a link below to make changes to your GiftWorks settings.

 Change Your User Settings Change the information for your user account.

Administrator users can access all areas of GiftWorks including settings. Administrators can also add a new user account, change user name, delete user accounts, set user passwords, and activate/disable user accounts. Users cannot sign in to GiftWorks until their user account is activated.

To activate an account, you must enter a password and select Activate account.

Deleting an Account

User accounts can only be deleted if the user has not ever signed in to GiftWorks. Once the user has signed in, their account cannot be deleted because it would affect the history that is maintained for each user account. Accounts that cannot be deleted can still be disabled. When a user account is disabled, that user cannot sign in to GiftWorks.

Change Security Level

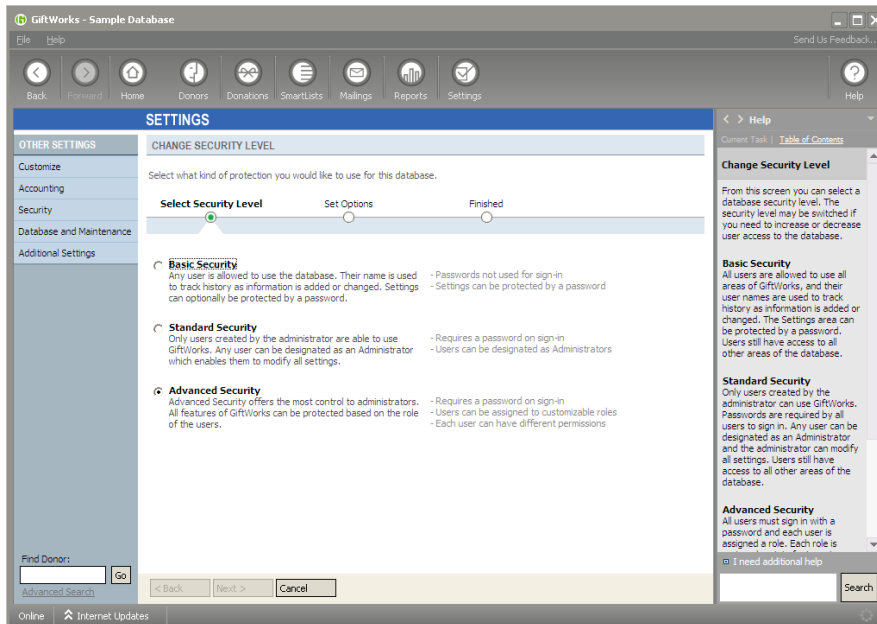
You can change the database security level from Standard back to Basic Security or from Standard to Advanced Security. Click on Change Security Level and select a different security level.

HELPFUL TIP

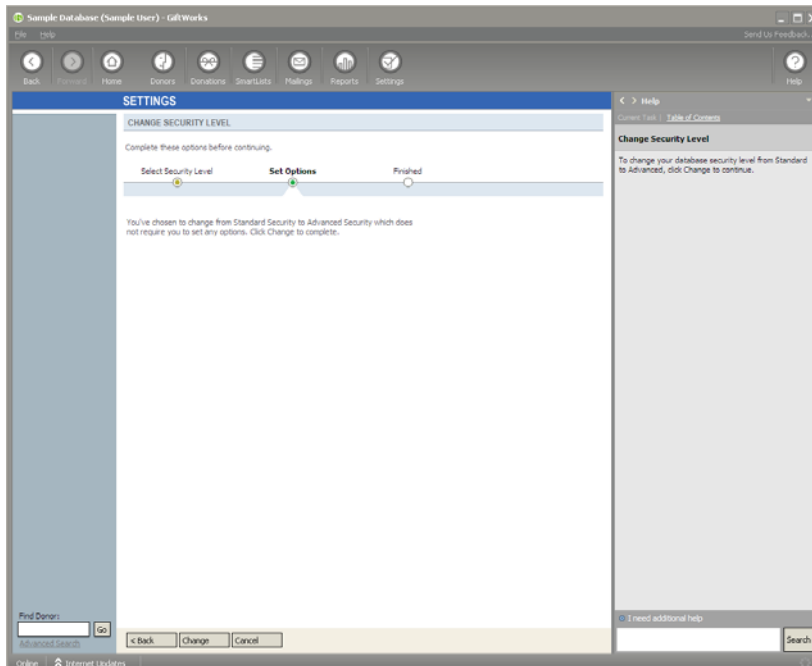
Standard Security might be the right database security level if you have a number of users who you want to all have Standard User access to GiftWorks.

Advanced Security

To change the security level from Standard to Advanced, click on the Settings section at the top and then click on the Security link or the Change Security Level link.

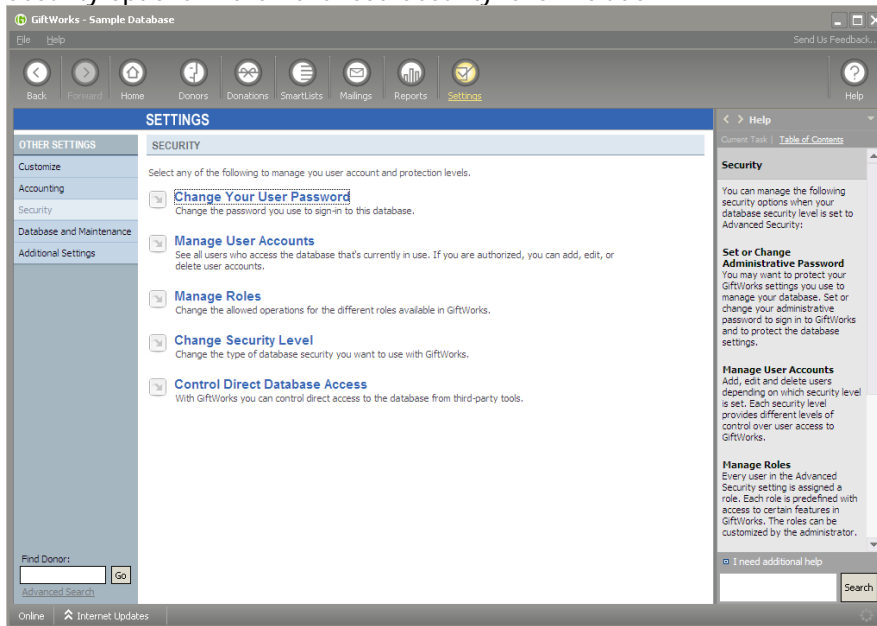


Select Advanced Security and click on Next to continue.



You do not have to set any other options to change to Advanced Security from Standard. Click Change to continue. If you change your database security level from Basic to Advanced, you will be made the administrator and will need to enter a password and hint to continue.

Security options in the Advanced Security level include:



- Set or Change Administrative Password
- Remove Administrative Password
- Manage User Accounts
- Manage Roles
- Change Security Level
- Control Direct Database Access

Manage User Accounts in Advanced Security





















Administrators can add a new user account, change user name, delete user accounts, set user passwords, and activate/disable user accounts. Users cannot sign in to GiftWorks until their user account is activated.

To activate an account, you must enter a password and select Activate account.

MANAGE USER ACCOUNTS

The list below shows the current users for this database. Click on a user to see the options for managing the account. The options for managing user accounts depends on the [Security Level](#) for this database.

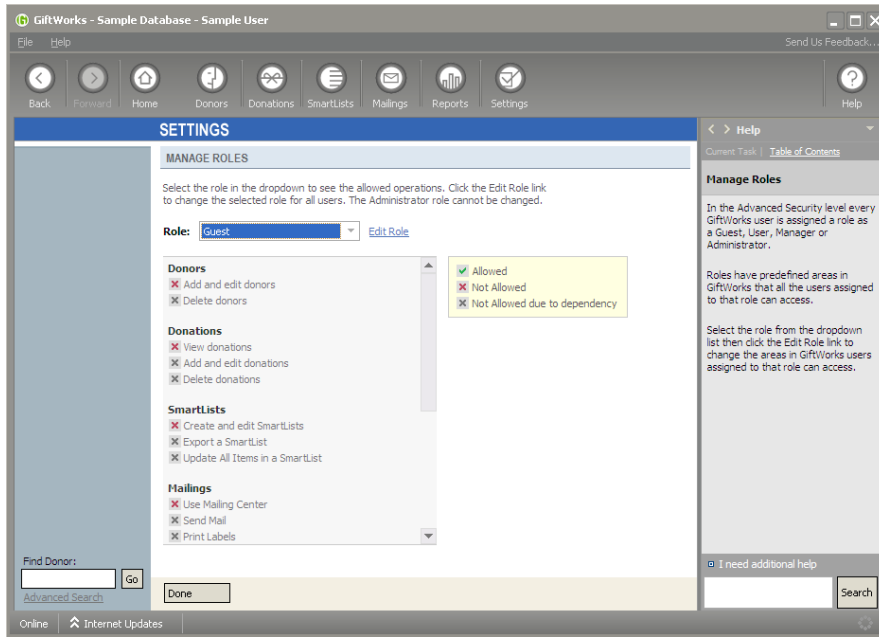
User Accounts

 James Williams	Active 
Role: User Change	Change name Reset password
Last Sign-in: 6/6/2008 11:01:24 AM	Delete account Disable account
 Sarah Jones	Active 
 Adam Lawrence	Active 
 Rick Samson	Disabled 
 Sample User (Me)	Active 
 Cindy Smith	Disabled 
 Sandy Jackson	Disabled 
 holly	Active 
 mark	Active 
 matt	Active 

[Add a new user account](#)

Deleting an Account

User accounts can only be deleted if the user has not ever signed in to GiftWorks. Once the user has signed in, their account cannot be deleted because it would affect the history that is maintained for each user account. Accounts that cannot be deleted can still be disabled. When a user account is disabled, that user cannot sign in to GiftWorks.



In the Advanced Security level every user is assigned a role as a Guest, User, Manager or Administrator instead of a user type in Standard Security. Each role is predefined with access to certain features in GiftWorks. However, the roles can be customized by the administrator.

Manage Roles

Select a role for the user from the dropdown box. You can edit the selected role by clicking on Edit Role and all users assigned to that role will have the same access to features in the database. This option allows you to make one change for many users if you want all the users assigned to that role to have the same database access. You can also customize a user's role if necessary.


HELPFUL TIP

When you limit the areas of the database a user or user role can access, the secured areas will not be available to view or edit in all areas of GiftWorks the secured areas occur. For example, if you restrict a user from viewing donations, the user will not be able to view donations that appear in any SmartList, the Donations area, or Reports.

Customize User Role

CHANGE USER ROLE

Select the role for this user from the dropdown below. Choose Custom to set specific operations. Click the Edit Role link to change the pre-defined roles for all users.

 **James Williams**

Selected Role: [Edit Role](#)

Allowed
 Not Allowed
 Not Allowed due to dependency

Donors

- Add and edit donors
- Delete donors

Donations

- View donations
- Add and edit donations
- Delete donations

SmartLists

- Create and edit SmartLists
- Export a SmartList
- Update All Items in a SmartList

Mailings

- Use Mailing Center
- Send Mail
- Print Labels
- Print Envelopes
- Manage Letter Library
- Manage mailing lists
- Manage mailing history

Reports


If you want to customize database features an individual user can access when the database is set in the Advanced Security level, select the user from the Manage User Accounts screen and click on the Change link. Select Choose specific operations from the dropdown box and then select the features the user can and can not access in the database. Click Save to continue.

Control Direct Database Access

CONTROL DIRECT DATABASE ACCESS

With GiftWorks you can control direct access to the database from third-party tools. Just set a database password and any third-party tools will need this password to access the database.

Current Password: **Not set**

 **Set Database Password**
Set a password to control direct access to the database from third-party tools.

Secure your database from being viewed or modified by third-party tools and programs by setting a database password. If you change your database security level from Advanced to Standard or from Advanced to Basic security, your Database Password will be cleared during the change. The feature is not available in the other two security levels.

Change Security Level

You can change the database security level from Advanced back to Standard Security or from Advanced to Basic Security. Click on Change Security Level and select a different security level.

HELPFUL TIP

Advanced Security might be the right database security level if you have many people who use GiftWorks and you want to secure a number of database features and also the access to and use of GiftWorks.