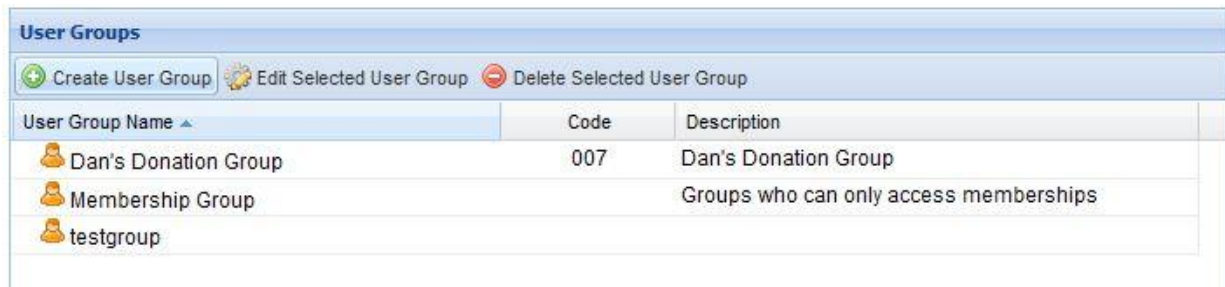





## User Groups

Navigating to your **System** tab, you'll find a sub-header called **User Groups**.

### User Groups

Clicking this button will bring up an interface that looks like this:



| User Group Name ▲  | Code | Description                            |
|--|------|--|
|  Dan's Donation Group | 007  | Dan's Donation Group                   |
|  Membership Group     |      | Groups who can only access memberships |
|  testgroup            |      |  |

1.1.

This is the menu for managing your user groups. Groups can be customized to allow/restrict access to the back of your NEON system. Image 1.1 shows the list of user groups that already exist in your system as well as their description to the right. You can create new groups via the 'Create User Group' button, edit existing ones with 'Edit Selected User Group', or 'Delete Selected User Group' to delete the group. Let's try to create a new user group and see the options that are available for customizing your NEON user-level access.

### User Group Quick Setup

\* Name :

Code :

Parent User Group :

Description :

### Basic Settings

|                  | Create/Edit              | View                     | Delete                   |
|------------------|--------------------------|--------------------------|--------------------------|
| Donation         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pledge           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Honor/Memory     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Solicitation     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Grant            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Membership       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Activity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Event            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| News             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Registration     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Product          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Inventory        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Order            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

1.2

Image 1.2 above shows what the user group creation screen looks like. Give your group a name, a 'code' if your organization uses one, and select a Parent User Group if you want to copy the permissions already given to an existing group of users to your new group. Finally, enter a description for this group that will appear on the front menu in 1.1. Now, let's look at the Basic Settings (1.3), where we'll specify the permissions of this group.

|                  | Create/Edit              | View                     | Delete                   |
|------------------|--------------------------|--------------------------|--------------------------|
| Donation         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pledge           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Honor/Memory     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Solicitation     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Grant            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Membership       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Activity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Event            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| News             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Registration     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Product          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Inventory        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Order            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

1.3

You can see three columns here : Create/Edit, View, and Delete. These are three permission categories that you can ascribe to different sections of your NEON system for this group of users.

Checking Create/Edit will allow users in this user group to create and edit items and/or records associated with the NEON partitions to the left.

Checking 'View' will limit the users in this group to viewing these aspects. Not having 'view' checked will hide this section of your NEON site entirely, including the associated tab.

The 'Delete' option will allow users in this group to delete records associated with certain portions of your NEON system.

Once you've set the basic permissions for this group, there are options to further specify user access to features of NEON. In image 1.4 below, you'll see the items to allow the users in this group to access.

## Other Features

- Email Audiences
- Edit Campaign Email
- Mail Merges
- Material Tracking
- Survey
- System Control Panel 1.4

Here you can allow the users in this group to create and delete email audiences, mail merges, material tracking, surveys, access the System control panel under your System tab, and edit campaign emails.

Finally, in 1.5 you will see an option to further specify user-level access for this group. Once you have set all permissions for this user group, click submit.

## Advanced Settings

- No Access to Donation Amount
- No Access to Others' Notes
- No Access to Others' Activities
- Send Campaign Email
- Publish Survey

1.5

When you click submit it will take you back to the menu from image 1.1 and display your group there.

We can now add specific users to this user group. Under the System tab, click [System Users](#).

Here you will see a list of all System users. It will show Active users as well as Deleted users, the group they are in, and their name.

Clicking [New User](#) will take you to the screen below, pictured in image 1.6.

### Employee

| Employee   |                                       |
|--|---------------------------------------|
| Contact Information: <span style="float: right;">■ = Required Information</span> |                                       |
| <b>First Name</b>  | <b>Last Name</b>                      |
| Middle Name:   | Email:                                |
| User Group: System Administrator   |                                       |
| NEON Login:  |                                       |
| Login Name   |                                       |
| Password   |                                       |
| Retype Password  |                                       |
| <input type="button" value="Continue"/>  | <input type="button" value="Cancel"/> |

For this user, fill in their first name, last name, and email if you wish. User Group will picture all of the groups from your menu in image 1.1 that you've created. Instead of assigning them the basic System User / System Administrator / Limited user levels, you can specify the group, and subsequently the permissions for particular users, by selecting the customized user group you've just created.