

About roles, security, and permissions

RescueGroups.org's security features allow you to grant restricted access to the features of your service to other members of your organization.

When your account was created, one person was given full administrative (Site Admin) permissions. That person can then grant permission to other volunteers.

For example, one of your volunteers may need to add new animals but does not need to add animal Journal entries or add new News items. You can give that user only the permissions he or she needs to do their job.

A *role* is a task a volunteer performs; *permissions* give them the capability to do the task and are connected to the role. Roles are assigned to a volunteer's **User Login Account**.



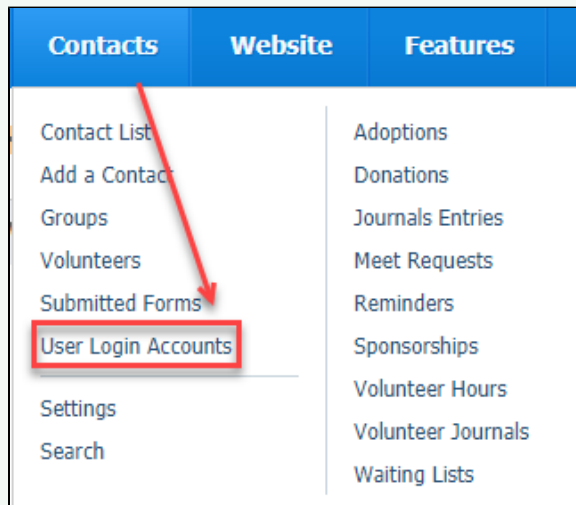
IMPORTANT

Depending on the service you are using, you may be able to make use of all or only some of the roles and permissions outlined in this chapter. If you are having trouble with any of this information, [please fill out a support ticket](#) so that we can help you.



Where do I find it?

You can assign roles to the [User Login Accounts](#) of your volunteers by going to **Contacts > User Login Accounts**.



On this page:

- [Available Organization Security Roles](#)

Related pages:

- [Assigning roles and permissions](#)
- [Removing or changing roles and permissions](#)

Available Organization Security Roles

The following security roles are available to assign to User Login Accounts. Find the description of the activities you want your volunteer to perform, and then assign the corresponding role.





All of your organization's helpers with the role of Volunteer, that is, anyone with a RescueGroups.org login who is assigned at least one volunteer-level role, is able to access some of your basic information about Contacts and Animals. See the Volunteer role information in the table below.

| Role Name | Activities the volunteer can perform |
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| Accounting Admin | Manages invoices and payments online |
| Adopter | Access their My Rescue page (Website Service only) and view any online forms they have submitted, animals they have sponsored, and favorite animals and breeds |
| Animal Add | <p>Please also see the Animal Admin role, below.</p> <ul style="list-style-type: none"> • Add, edit, and delete animal entries • Add and edit animal templates • Add, update, and delete animal media • Upload, view, and print animal files • Add animal relationships • Add an adoption for an animal • Manage meet requests for the animals • Manage Rainbow Bridge entries • Manage custom special lists • View animal history • Create adoption contract PDF • View a contact's adoption history • Can access the Pet Adoption Kiosk feature |
| Animal Admin | <p>Manages all facets of the organization's animals, including all of the activities for the Animal Add role, plus:</p> <ul style="list-style-type: none"> • Configure animal options • Set fields to "required" • Enable and disable fields • Update multiple animals (mass update of animals) • Delete animal files • Manage animal sponsorships • Can create and manage Pet Adoption Toolkits |
| Animal Attendance Admin | <p>Updates animal event attendance</p> <p>NOTE: This role is being remodeled. At this time, please also add the Animal Add role for your volunteer in order to completely manage event attendance.</p> <p>With both roles, this volunteer can:</p> <ul style="list-style-type: none"> • View animal attendance • Add, edit, and delete animal attendance information |
| Animal Foster Update | Can update their own foster animals as well as mark them deleted, but cannot add animals to the organization's account. |
| Animal Network Admin | Can view any animals that are shared in the Animal Network |
| Animal Picture User | Can upload pictures to the animal detail pages on the organization's website. |
| Board of Directors | Members of the Board of Directors |
| Calls Admin | Adds and modifies call information as well as emails the contact |
| Calls Operator | Updates calls assigned to them, but not all calls |
| Campaign Admin | Administers email campaigns |
| Certificates Admin | <p>Can create, void and run reports on certificates</p> <p>NOTE: This role is in place for future expansion and has no use in the current features for your account.</p> |
| Certificates User | <p>Can create and print certificates</p> <p>NOTE: This role is in place for future expansion and has no use in the current features for your account.</p> |
| Colony Admin | Can update animals, caretakers and journal information related to Colonies |
| Contacts Add | <p>Add contacts</p> <p>Can assign a contact to a Contacts Group</p> |

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| Contacts Admin | Add and edit contacts Can add and edit custom Contacts Groups Can remove a contact from a Contacts Group Can merge Contacts |
| Content Admin | Volunteers who can update content on the website |
| Doc Admin | Can add, and delete website files (this role is only pertinent to the Website Service) Does not pertain to animal files |
| Document User | Can view website files (this role is only pertinent to the Website Service) |
| Email Services Admin | Can manage Email Hosting services for your organization |
| Event Admin | Add, update, and delete events |
| ExtsyncAdmin | The external synchronization admin can view, change, enable, and disable all animal exports. However, this role is only pertinent to the Website Service . Outside of the Website Service , the Animal Add role can view exports, but only the Site Admin can change, enable, or disable animal exports. |
| Guestbook Admin | Can edit and delete guestbook entries posted by guests |
| Image Admin | Uploads or deletes images |
| Image User | Uploads images |
| Inventory Admin | Manages physical inventory and loaner equipment |
| Journal Admin | Adds, updates, and deletes medical information or any other journal entry information |
| Journal User | View journal entries |
| Look and Feel Admin | Manages the layout selection, logo, custom CSS and color selections for your Website Service |
| Media Admin | Add, update, and delete animal pictures and other media |
| News Admin | Add and delete news items |
| Online Form Admin | <ul style="list-style-type: none"> • Sets up and configures online forms • Manages online forms questions • Manages steps for a submitted form • Can view all submitted forms • Can view all comments on submitted forms • Can comment on submitted forms • Can assign a submitted form • Can change submitted form status • Can contact applicant through form • Can complete a form for a contact • Can create, edit and run Online Forms reports with the Website Service • Can share blank PDF of online forms • Can edit submitted form answers |
| Online Form Manager | <ul style="list-style-type: none"> • Can view all submitted forms • Can view all comments on submitted forms • Can comment on submitted forms • Can assign a submitted form • Can change submitted form status • Can contact applicant through form • Can complete a form for a contact • Can change Pass/Fail status of step • Can run reports with the Website Service |

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| Online Form Reviewer | <ul style="list-style-type: none"> • Can view all submitted forms • Can view all comments on submitted forms • Can comment on submitted forms • Can assign a submitted form • Can change submitted form status • Can contact applicant through the form • Can run reports with the Website Service |
| Online Form User | <ul style="list-style-type: none"> • Can view all submitted forms • Can view all comments on submitted forms • Can comment on submitted forms • Can assign a submitted form • Can change submitted form status • Can contact applicant through the form • Can complete a form for a contact • Can change Pass/Fail status of step • Can run reports with the Website Service |
| Photogallery Admin | Can add, delete, and reorder photo gallery pictures |
| Memorials Admin (Rainbow Bridge) | Can add and delete memorials and upload pictures to memorials |
| Reports | Can create and run reports |
| Shop Admin | Administers the organization's online store |
| Site Admin | <p>Includes all permissions for all roles, and also includes permission to administer users, layout, custom pages, and can manage other RescueGroups.org services.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> The Site Admin is the only role which can view and edit the Animal Description Header & Footer and Enable and Add Microchips.</p> </div> |
| Voicemail Admin | Can administer mailboxes and voicemail passwords |
| Volunteer | <p>Can view all of the following:</p> <ul style="list-style-type: none"> • All animal information listed on the animal's record, including that for deceased or adopted animals • Animal locations marked as private • (Website Service only) All animal files, including those marked as private, only when logged into your organization's website. Please note, without the website service, or to access animal files when not logged into the organization's website, a volunteer must also have the role of Animal Add. • Contacts • Animal foster information • All colonies • All adoptions • Volunteers-only pages • Adopters-only pages • Can view and print kennel cards |

 **NOTE**

When adding users to a security role, you may see the roles of *Certificate Admin* and *Certificate User*. These roles are in place for future expansion and have no use in the current features for your account.

 You can see a report of everyone who has permissions on your Website account by going to **Reports > Reports List** and running the **Users with Website Permissions** report.

Have a question about this topic?

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