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## **Are There Adequate User Permissions to Control Access to Confidential Information?**

The administrator can control who uses Donarius and what permissions each has by adding each user, assigning them a password and indicating what information they are allowed to view and/or edit.

To setup the users the administrator must first choose a password for themselves. Only administrators can add users and setup their permissions/privileges. To ensure that only authorized users can access the data, each user should memorize their password or record it in a password manager. Each user's password must be different. If a user forgets password or their password manager loses it, the administrator must select a new one.

For each user the administrator enters this information:

- users name
- users title
- password
- whether they have full or restricted access

For a restricted access user, the permissions below can be chosen.

### **Access to Donor Information:**

Each donor can be given permission to:

- view but not edit donor information
- view & edit donor information
- enter new donors
- delete donors
- merge duplicate donors

Select a combination of these choices. When a user is allowed to view donor info, they will also be able to view and print these:

- a) a donor list
- b) a church/donor directory
- c) labels/envelopes for mailings
- d) letters and emails that do not have any donation amounts.

If they can only add new donors, they cannot do any of the above.

### **Teller/Counter Permissions:**

Some churches have volunteers called tellers or counters to record the money received as cash or checks. Sometimes each donor has a numbered envelope which they use to give their donation. The tellers/counters open the envelope and verify the donation inside it. They can then record the amount in Donarius by entering the envelope #. Some churches do not want tellers/counters to know who made the donation. In that case the envelope has a number but not the donor's name. To prevent the tellers/counters from knowing whose donation they are recording, remove the checkmark where it says **May know who**



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**an env# belongs to.** The software will not display the donor's name when entering the donation.

### **Enter/edit Donations:**

Each user can be allowed to enter/edit:

- a) donations a certain number of days in the past up to the present
- b) all the donation info or only the note, motivation code or *when* field connected to the donation

You also have the option of preventing the user from entering or editing any donations.

### **Reports:**

For each user select whether they should be allowed to view a list of donor and their donations. Also choose how far back in time the user is allowed to run a report or have no access to reports at all.

### **Other Permissions:**

Users can also be allowed or prevented from:  
adding/editing *donor types* and *characteristics*  
adding/editing *categories*  
adding/editing *sub-categories*  
entering/editing donations with certain *payment methods*  
entering/editing donations for certain *categories*

All the above actions are done by going to the **Setup** menu and choosing **Users...**

## **Glossary**

|                             |                                                                                                                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>donor type</i>           | each donor is assigned a type such as member, visitor, business, church, etc.                                                                                                             |
| <i>donor characteristic</i> | a characteristic is something about a donor that can be true or false e.g. is part of the choir or a committee, has a certain position such as elder, usher or Sunday school teacher      |
| <i>category</i>             | each donation is given for a certain purpose such as the General Fund, Building Fund, Missions, etc.                                                                                      |
| <i>sub-category</i>         | each <i>category</i> can also have <i>sub-categories</i> e.g. a Missions <i>category</i> might have the <i>sub-categories</i><br><b>Missions: Youth, Missions: Africa, Missions: Asia</b> |
| <i>payment method</i>       | each donation is given using a method such as cash, check, credit card, online payment, etc.                                                                                              |
| <i>when</i>                 | each donation is given at a certain service time (AM/PM) or location                                                                                                                      |

Sources:

<https://www.donarius.com/Help/hs225.htm> (Accessed Sept 10, 2026)