

Privacy Protected Records

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Information

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Privacy Protected Records (PPR)

Checking the PPR box on a Profile form will designate a constituent's record as being protected, and only Super Admins and PPR admins will have access to the constituent's data. Limiting access to certain records is useful for famous constituents and student data.

When you tag a record as PPR, the following conditions apply for both constituents and admins (except Super admins and PPR admins):

- It is NOT included by default in data viewer queries to build an email marketing segment.
- It is NOT displayed in an admin search of the directory.
- It is NOT displayed in the constituent directory search.
- It is NOT included in queries to create Groups.
- It is NOT included in queries to populate sub-communities.

To **add the Privacy Protected Record field to your Profile Form** and give admins the ability to designate records as Privacy Protected:

- On the profile form, select the **Admin Only** tab.
- From the Manage Category dropdown, select **Add Existing Field**.
- Select the Privacy Protected Record field to add it to your Profile form.

***NOTE:** The setting gets automatically cloned as part of the profile to all sealed sub-communities. If you set the PPR on a member record on the top level, the behavior associated with PPR is applicable in the sealed sub-community.*

PPR in Data Viewer

Super Admins and Privacy Protected Records Admins will see a checkbox in Data Viewer to include Privacy Protected Records.

If a query or criteria template containing Privacy Protected Records gets saved, it will only appear in the saved query or criteria template grid for Super Admins and Privacy Protected Records Admins.

PPR Admin Right

This right allows PPR Admins to work with members marked as Privacy Protected and non-exportable fields. Super Admin should give this right with other rights (example, Member Admin) since it has no power as a standalone admin right.

- Super admin or PPR admin can add Privacy Protected Records to an email segment data viewer query.
- PPR admin and Super admin can find PPR records in an admin directory search
- PPR admin and Super admin can search PPR records in the directory
- PPR admin and Super admin can include PPR member records in queries to create groups
- PPR admin and Super admin can include PPR member records in queries to create sub-communities

For Admins **without PPR rights**, records marked as Privacy Protected will **NOT**:

- be included in Data Viewer queries
- be included in Data Viewer queries to build an Email Marketing constituent list
- be included in queries to create Groups
- be included in queries to populate sub-communities
- be displayed in the Find Member Record control
- be displayed in a constituent directory search

PPR and Reporting

If a person is marked as Privacy Protected and completes a Form, Event, or Campaign, their information will be included in Reporting. The admin pulling the report will not need to be a Privacy Protected Records Admin to pull the Form Report, Event Report, or Campaign Report and include these individuals.

Admin Rights and Directory Results

These are the admin rights who have access to administratively managing member records from the Directory results.

Privacy Protected records (PPR) will NOT be returned in the directory results. Admins (with the PPR admin right) will only be able to find a PPR record by enabling the PPR checkbox in Data Viewer, looking up constituents with Find Member Record, or going to the constituent's Profile Page.

***NOTE:** PPR Admin is an additive right only, as a standalone right it does not provide access for administrative rights to member records - it must be added to an existing Super Admin or Member Admin*

Admin Type	Regular member record	Is hidden	Is directory hidden	PPR Non-Member
Super Admin	X	X	X	- X
Member Admin	X	X	X	- X
Profiles Admin	X	-	-	- -
Manage Class Notes	X	-	-	- -
Manage Classifieds	X	-	-	- -
Photos Admin	X	-	-	- -

Groups Admin	X	-	-	-	-
PPR Admin	-	-	-	-	-

Non-Exportable Fields

When adding/editing a Profile field, there is a checkbox for Super Admins and Privacy Protected Records Admins in the Advanced Options: **Allow export of this field**. The field is checked by default.

- Unchecking the box will remove the field from showing in Data Viewer.
- No queries can be built with the field
- No Groups can be driven off of the field
- The field will also be excluded from the Select Field area when building an Export or Report.

Only Super Admins and Privacy Protected Records Admins will be able to utilize non-exportable Profile fields in the above scenarios.

Saved queries and criteria templates containing non-exportable fields will appear in the query and criteria template grids to other admins.

The system will not include the non-exportable fields in the field list for other admins.

If other admins modify the field list and save over the original query or criteria template, the system will remove the non-exportable fields.

- The impact for Super Admins and Privacy Protected Records Admins is that the saved query or criteria template they choose to use may not have all of the fields in it that they originally selected.

Preventing Constituents from being found in the Directory Search

The **Is Directory Hidden** field allows administrators to designate people who should not be returned in the Directory Search. The "Is Directory Hidden" checkbox allows site administrators to disable individual constituents from appearing in the Directory Search, without disabling any other constituent features or capabilities. This field is not as restrictive as marking them as "Is Hidden" or as a Privacy Protected Record.

You can find the **Is Directory Hidden** field in the list of existing fields for use when creating a Profile Form. You should place this field on the Admin Only tab of the profile.

Hiding Records

The **Is Hidden** field allows administrators to designate people whose records should be hidden. A record designated as "Is Hidden" hides the constituent from directory search, **plus** all their activities in the community. This option provides the complete way to hide a constituent's information. For example, you can use this to prevent famous constituents from displaying on your site.

The **Is Hidden** option completely removes the user from appearing on the site. The user is not shown to

regular members in the directory display, search results or profile page display - only Super admins can find those records in a search. The hidden member can interact with any of the member-facing systems, i.e. message boards, class notes, attendee lists, etc., but only Super Admins will be able to see it.

The Is Hidden field can be found in the list of existing fields for use when you are creating a profile form. This field should be placed on the Admin Only tab of the profile.

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