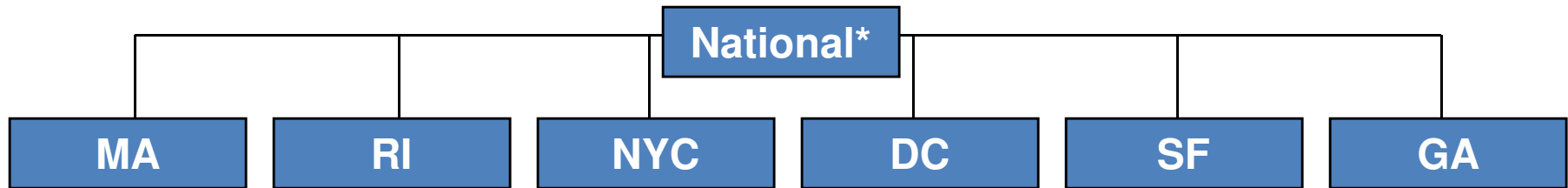
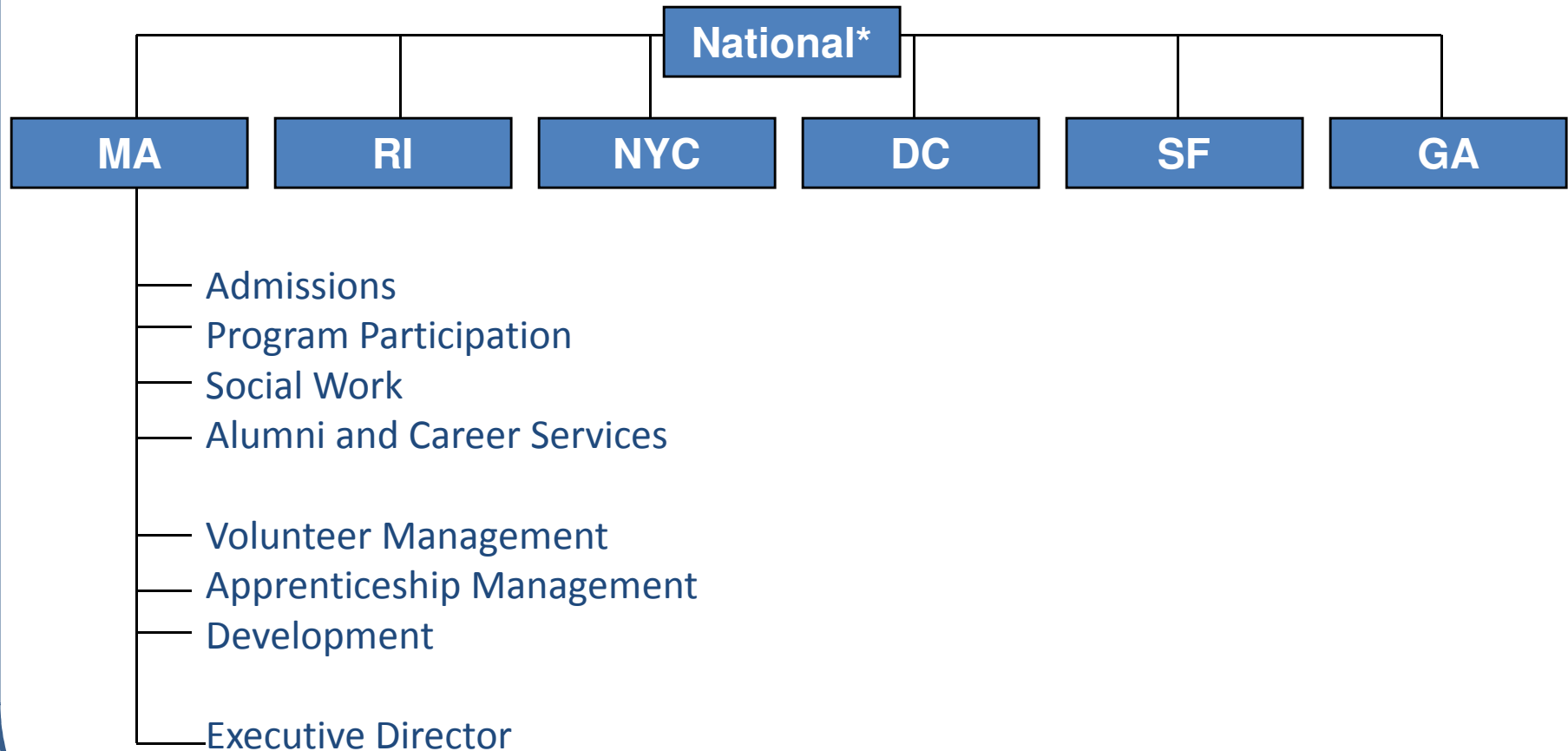


Year Up Security Model

Year Up Organization



Year Up Organization



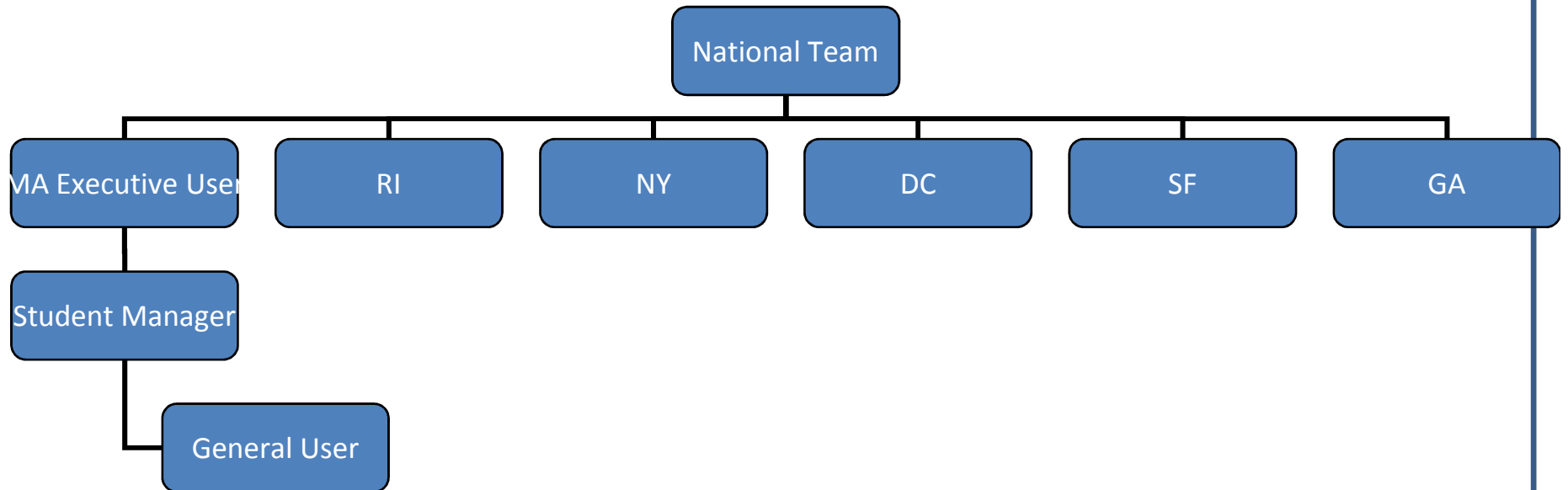
Our Challenges

- Segregate data so that sites only see the data that is relevant to them.
- Within sites, protect confidential data
 - Development
 - Student Information (Social Work, Criminal Background, etc)

Roles, Profiles and Sharing

- Roles
 - Determine which records are visible to whom, based on owner and sharing rules
- Profiles
 - Determine permissions for creating, reading, editing and deleting records for each object
 - Availability of Record Types, Page Layouts, Applications and Tabs
 - Field level security access

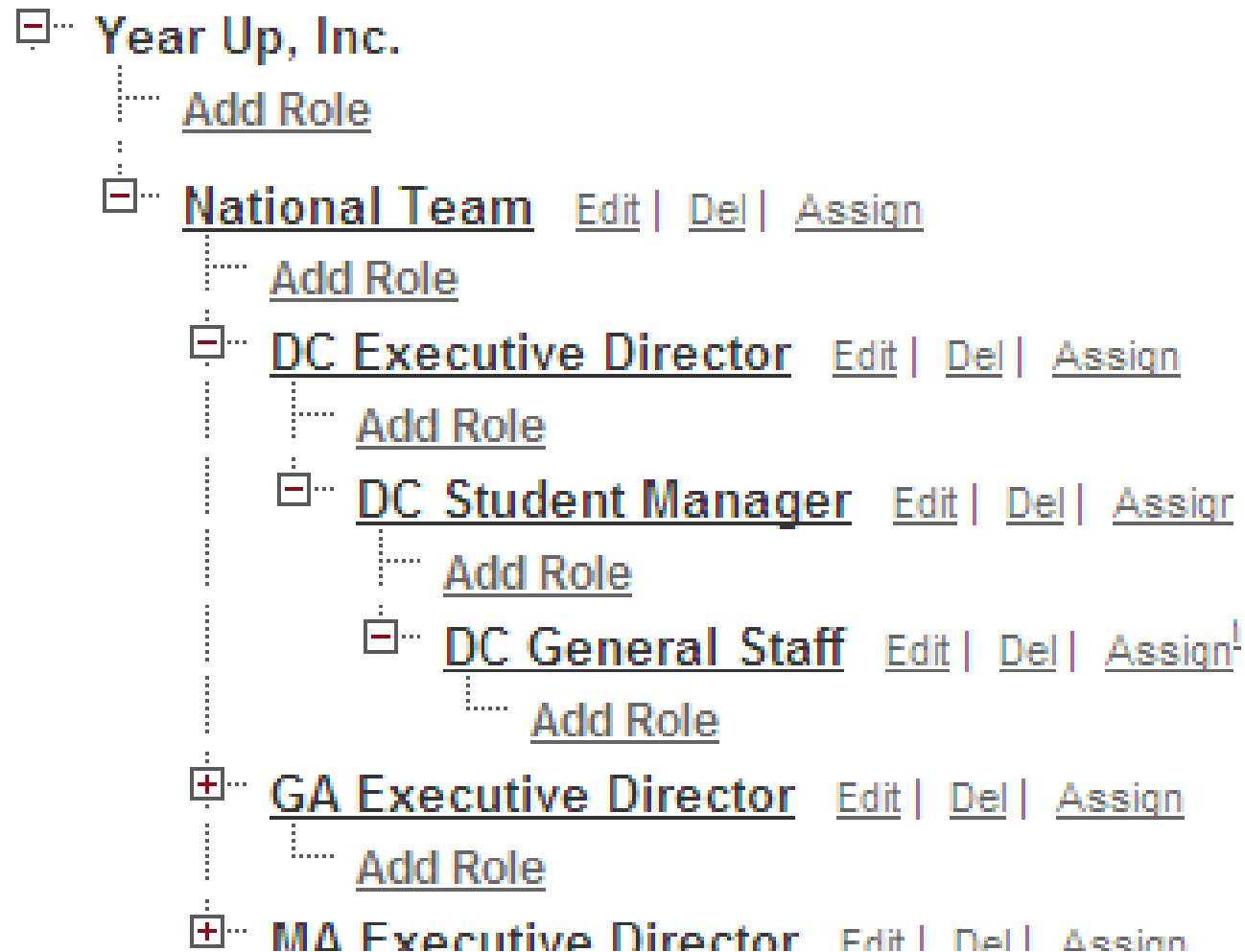
Roles



Roles

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



Profiles

- Admissions
- Student Management
- Alumni

- Apprenticeship Management
- Development

- Executive

- General Staff
- Read Only

- Sys Admin

What's Working

- Keeping Necessary Information Private (e.g. Social Work, Criminal History) via Roles and Profiles

What's Challenging

- Cross - Site sharing of Contacts, Accounts and Opportunities
- Maintenance of Sharing Rules
- Profiles don't work well in start-up sites where staff take on multiple responsibilities.

Questions?