User Security Access

AmpliFund employs a modular user security model so that you can have detailed control over which records and what level of access your users will have. The base user security is set on the User Details page. This includes record types, level of access for each, and any account-wide restrictions for the user. Some record types may not be applicable to your organization based on your account subscription.

On individual records, users can be added as Managers or Additional Users. There can only be one manager designated per record, but Managers and Additional Users share the same level of permissions. Grants also have the Grant Writer role, and Awards have Funder and Recipient roles.

Finally, users can be assigned as Assignee on line items, performance goals, tasks, and workflow actions.

Base User Security

Access Levels

Access levels can be applied to each Record Type.

- **Admin:** User can view, create, edit, and delete records; can add progress against record and collaborate; has access to Administration areas
- **Editor:** User can view and edit records (cannot create or delete); can add progress against record and collaborate
- **User:** User can view record details (cannot create, edit or delete); can add progress against record and collaborate
- **View Only:** User can view record only (cannot create, edit, delete, add progress, or collaborate)

Record Types

- **Account:** Account access will apply to all record types. All Account users will have access to all areas of the account, including Administration. Account Admin are the only users who can create and delete user records, and can act as other users.
- **Applications (Applicant Portal):** This includes the Applicant Portal and any applications your organization creates. It does not include any applications that are submitted to your organization.
- **Awards:** This includes awards that your organization distributes, as a grant funder.
- **Departments (all records linked to departments)**: This includes any records that are linked to the user's department, which could include awards, funds, grants, opportunities, or projects.
- **Funds:** This includes all fund records. Users will be able to see which opportunities and awards are tied to the fund, but will not have access to those records in detail.
- **Grants:** This includes all grants that your organization has received, as well as any grant opportunities or sub-awards.

- **Opportunities:** This includes all opportunities, including any grant opportunities. Admins and Editors can also access Form Templates.
- **Projects:** This includes all projects. It does not include any grants linked to the projects.
- **Research:** This includes the Research area.

Advance Restrictions

Clients can also define account-wide restrictions for users. In these cases, users will not be able to view or access restricted content, regardless of any other role or permission.

- **Approvals:** User cannot approve or reject records including payment requests, payment authorizations, or amendments
- **Budget:** User cannot access budget or expense data
- **Payment Authorizations:** User cannot create or edit payment authorizations. Can still view.
- **Post-Award:** User cannot access any post-award data
- **Salary:** User cannot access any salary data

Record-Level Permissions

Users can be assigned direct access to records as Managers, Additional Users, or other roles as applicable. None of these fields are required.

- **Managers:** Managers are available on Awards, Funds, Grants, Opportunities, and Projects. Awards designates Funder and Recipient Managers. Managers have full access to edit or delete their record. There can only be one manager per record.
- **Additional Users:** Additional Users are available on Awards, Funds, Grants, Opportunities, and Projects. Awards designates Funder and Recipient Additional Users. Additional Users have the same permissions as a Manager and have full access to edit or delete their record. There can be multiple Additional Users per record.
- **Grant Writers:** Grant Writers are only available on Grant records to support pre-award grant-seeking processes. Grant Writers have full access to the pre-award and collaboration areas of the grant. They do not have post-award access. There can be multiple Grant Writers per record.
- **Assignees:** Assignees are available on budget line items, performance goals, tasks, and workflow actions. Assignees have edit access to their record and can track progress against it, as applicable. There can be multiple Assignees per record.

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User Security Reference

Record Type	Admin	Editor	User	View Only	Manager/Additional Users
Account	Account Admin have full create, edit, and delete access to all areas of the account. Account Admin are the only role that can edit License Information; add recipients; and create, delete, or act as other users.	Account Editors can view and edit all areas of the account, including Administration areas. They can add progress against records and collaborate. They also can create all records in the Administration area except recipients and users.	Account Users can view all areas of the account, and can add progress against records and collaborate. They can also view all records in the Administration area and can create, edit, and delete workflow instances, departments, purpose areas, budget categories, Note Types, Expenses, and Custom Forms and Fields.	Account View Only users can view all areas of the account. They cannot add progress or collaborate. They have view only access to the Administration area.	
Applications	Application Admin have full access to the Applicant Portal, including the ability to create, edit, delete, apply, and withdraw applications. As Admin users, they also have full access to Administration documents and access to the Administration module.	Application Editors can view and edit all applications. They can also save opportunities. They cannot create, apply, or withdraw applications.	Application Users can view and contribute to applications. They cannot save opportunities or create, apply, or withdraw applications.	Application View Only users have view-only access to all applications.	

Record Type	Admin	Editor	User	View Only	Manager/Additional Users
Awards	Award Admin have full create, edit, and delete access to all awards (does not include sub-awards). They can also activate and send award emails. As Admin users, they also have full access to Administration documents and award-management-related access to the Administration module.	Award Editors have full edit access for all awards (does not include sub-awards), including the ability to create and contribute to performance plans, budget, approve payments and amendments, edit settings, and collaborate. They can also send award emails. They cannot create or delete awards.	Award Users have full view access for all awards (does not include sub-awards). They can also add expenses and achievements and collaborate.	Award View Only users have view-only access for all awards (does not include sub-awards).	Award Managers and Additional Users have full create, edit, and delete access to assigned awards. They can also activate and send award emails.
Departments	Department Admin have full create, edit, and delete access to all records within their department, which can be awards, funds, grants, opportunities, and projects. As Admin users, they also have full access to Administration documents and department-management-related access to the Administration module.	Department Editors have full edit access to all records within their department, which can be awards, funds, grants, opportunities, and projects. They can contribute and collaborate on the records. They cannot create or delete records.	Department Users have full view access to all records within their department, which can be awards, funds, grants, opportunities, and projects. They can contribute and collaborate on the records.	Department View Only users have view-only access to all records within their department, which can be awards, funds, grants, opportunities, and projects.	Department Managers and Additional Users have full create, edit, and delete access to assigned records within their department, which can be awards, funds, grants, opportunities, and projects.

Record Type	Admin	Editor	User	View Only	Manager/Additional Users
Funds	Fund Admin have full create, edit, and delete access to all funds. They do not have access to associated opportunities or awards. As Admin users, they also have full access to Administration documents and fund-management-related access to the Administration module.	Fund Editors have full edit access for all funds, including the ability to add commitments and income. They do not have access to associated opportunities or awards. They cannot create or delete funds.	Fund Users have full view access for funds. They can also add commitments and income and collaborate. They do not have access to associated opportunities or awards.	Fund View Only users have view-only access for all funds. They do not have access to associated opportunities or awards.	Fund Managers and Additional Users have full create, edit, and delete access to assigned funds. They do not have access to associated opportunities or awards.
Grants	Grant Admin have full create, edit, and delete access to all received grants or awards. This includes any grant opportunities or sub-awards. As Admin users, they also have full access to Administration documents and grant-management-related access to the Administration module.	Grant Editors have full edit access to all received grants or awards. This includes any grant opportunities or sub-awards. They cannot create or delete grants.	Grant Users have full view access to all received grants or awards. This includes any grant opportunities or sub-awards. They can also add expenses and achievements and collaborate.	Grant View Only users have view-only access for all received grants and awards. This includes any grant opportunities or sub-awards.	Grant Managers and Additional Users have full create, edit, and delete access to assigned received grants or awards. This includes any grant opportunities or sub-awards.

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Record Type	Admin	Editor	User	View Only	Manager/Additional Users
Opportunities	Opportunity Admin have full create, edit, and delete access to all opportunities, including grant opportunities. They also have access to submitted applications. As Admin users, they also have full access to Administration documents and opportunity-management-related access to the Administration module.	Opportunity Editors have full edit access to all opportunities, including grant opportunities. They also have access to submitted applications. They can test, configure, and collaborate on opportunities. They cannot create or delete opportunities.	Opportunity Users have full view access to all opportunities, including grant opportunities. They also have access to submitted applications. They can test opportunities, configure forms and templates, add program funding, and collaborate.	Opportunity View Only users have view-only access to all opportunities, including grant opportunities. They also have view-only access to submitted applications.	Opportunity Managers and Additional Users have full create, edit, and delete access to assigned opportunities. They also have access to submitted applications for their opportunity.
Projects	Project Admin have full create, edit, and delete access to all projects. They do not have access to associated grants. As Admin users, they also have full access to Administration documents and project-management-related access to the Administration module.	Project Editors have full edit access to all projects. They do not have access to associated grants. They cannot create or delete projects.	Project Users have full view access to all projects. They can also add to the budget and performance plans and collaborate. They do not have access to associated grants.	Project View Only users have view-only access to all projects. They do not have access to associated grants.	Project Managers and Additional Users have full create, edit, and delete access to assigned projects. They do not have access to associated grants.

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Record Type	Admin	Editor	User	View Only	Manager/Additional Users
Research	Research Admin have full access to the Research area, including saving searches and opportunities, sending opportunities for review, and converting to pre-award grants. They cannot access associated grants. As Admin users, they also have full access to Administration documents and view access to the Administration module.	Research Editors have full access to the Research area, including saving searches and opportunities, sending opportunities for review, and converting to pre-award grants. They cannot access associated grants.	Research Users can save searches and opportunities, and send opportunities for review. They cannot convert opportunities to pre-award grants nor access associated grants.	Research View Only users can search for new opportunities. They cannot save searches or opportunities, nor send opportunities for review. If assigned an opportunity for review, they cannot convert to pre-award grant.	