

2024 Product Roadmap:

Building Efficiency, Compliance, Scalability, & Consolidation

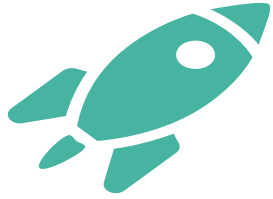
*User Security
Grant Seeker Training*

AmpliFund 

A G E N D A

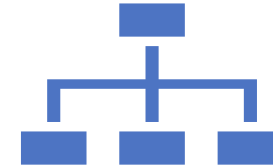
- Launch & User Role Migration
- New Security Model
- Create / Edit User
- User Personas
- Q&A

LAUNCH & USER MIGRATION



Launch date

11/16



User roles:

Current	New
Org Admins	Admin, Account level
Executives	View, Account level
Department Admin	Admin, Department level
Department User Salary	User, Department
Department User No Salary	User, Department (with Salary restriction)
Project Admin	Admin, Project Level & View, Grant Level
Project User	Editor, Project Level & View, Grant Level

NEW USER SECURITY MODEL OVERVIEW

Goal: Increase control, flexibility and compliance over user access, encourage further use of the unlimited user model to promote synergy in grant management.

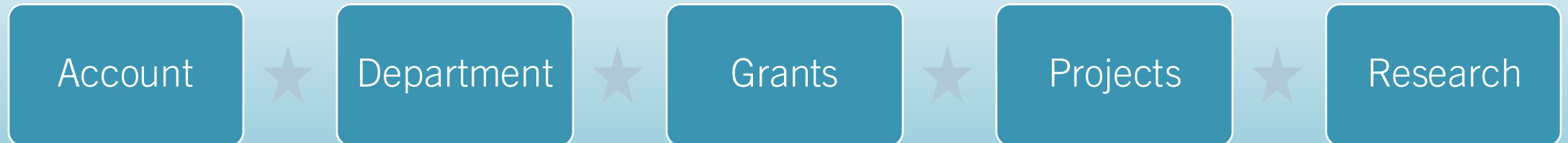
Features:

- New role types
- Accessed assigned at the object level
- Advanced viewing restrictions
- More robust record permissions
- Continued ability to assign workflow actions & tasks outside assigned access

NEW ROLES

- Admin - Can view, create, edit, delete and approve selected records
- Editor - Can view and edit record, and can assign users
- User - Can view records, can document progress against budget and performance
- View Only - Can view records

OBJECT LEVELS



ADVANCED RESTRICTIONS

- Approvals (for Sub-Awards)
- Budget
- Payment Authorizations (for Sub-Awards)
- Post-Award
- Salary

RECORD PERMISSIONS

Pull from users list (rather than staff)

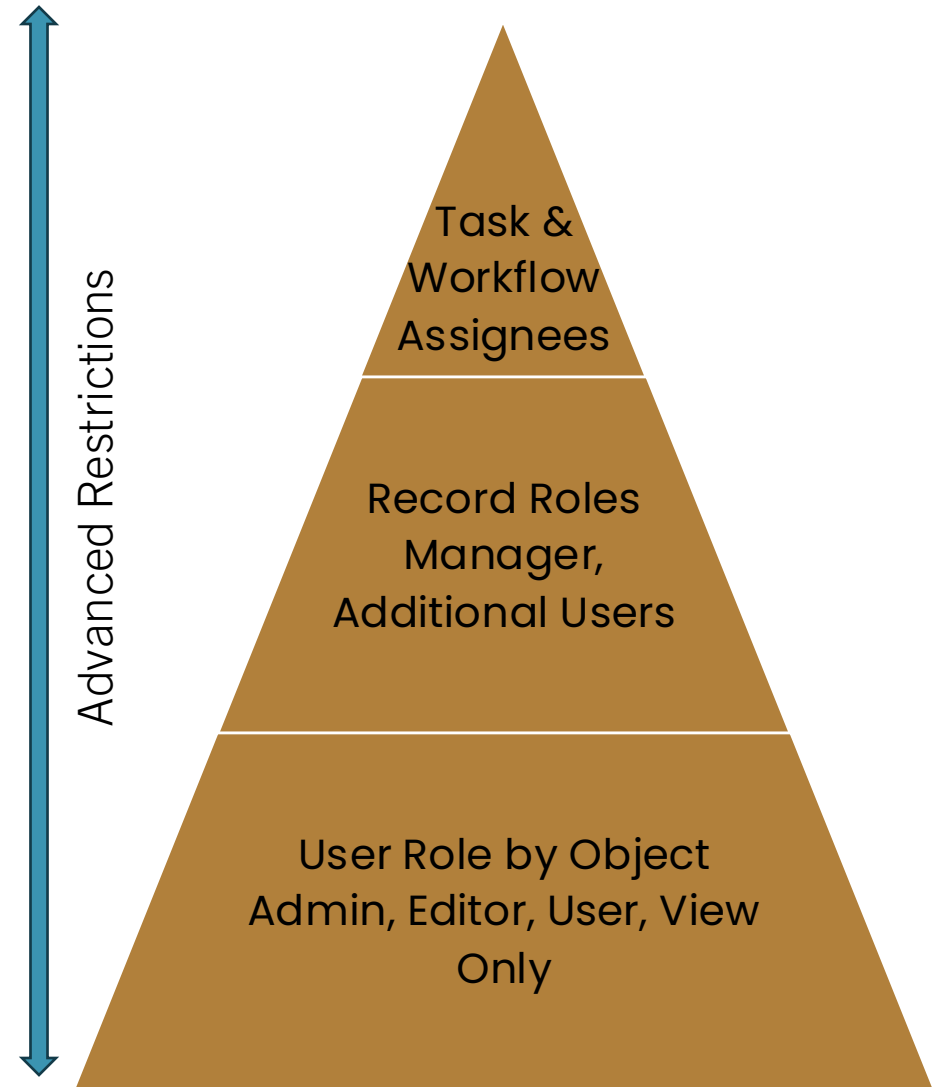
No longer required

Additional users supports multiple selection

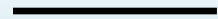
Revised titles for clarity

Object	Old Role	New Role
Grants	Grant Manager	Manager
Grants	Additional Staff	Additional Users
Grants	Grant Writers	Grant Writers
Projects	Project Manager	Manager
Projects	Additional Staff	Additional Users
Sub-Awards	Responsible Person	Funder additional users
Sub-Awards	Grant Manager	Funder manager
Sub-Awards	Recipient Grant Manager	Manager
Sub-Awards	n/a	Additional Users
Budget Item	Responsible Individual	Assignee
Performance Goal	Responsible Individual	Assignee
Tasks	Responsible Individual	Assignee

PUTTING IT ALL TOGETHER



IN PRODUCT REVIEW



Create User

Edit User

USER PERSONA
#1 – RESEARCH
RICK

Rick is:

- Part of the Planning & Development Department
- Searches for new funding opportunities
- Sends opportunities for review but cannot add grants to AmpliFund

Rick's user access:

- Research=User
- Department=View Only
- Advanced Restrictions=Post-Award, Budget

USER PERSONA
2 –
DEPARTMENT
DEBBIE

Debbie is:

- Part of the Public Works Department
- Not involved in pre-award efforts
- Responsible for monitoring her grants budgets & submitting reporting to funders
- Reviews but cannot approve sub-recipient payment requests

Debbie's user access:

- Department=Editor
- Advanced Restrictions= Approvals

USER PERSONA
3 –
PERFORMANCE
PAIGE

Paige is:

- Responsible for reporting performance outcomes across her organizations grant portfolio
- Not involved in pre-award efforts
- Conducts reporting across all grants and her organization uses projects

Paige's user access:

- Grants=User
- Projects=User
- Advanced Restrictions= Approvals, Budget, Payments, Salary

USER PERSONA
#4 – GRANT
GRACE

Grace is:

- Head of the centralized grants team

Grace's user access:

- Account=Admin
- Advanced Restrictions=None

**USER PERSONA
#5 – PROJECT
PETER**

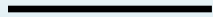
Peter is:

- Responsible for initiatives that span a few departments
- Is not involved in pre-award
- Should not have access to salary information

Peter's user access:

- Grants=Editor
- Project=Admin
- Advanced Restrictions=Salary

IN PRODUCT REVIEW



User persona comparison

Q & A

