

# 2024 Product Roadmap:

*Building Efficiency, Compliance, Scalability, & Consolidation*

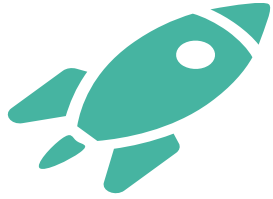
*User Security*  
*Recipient Training*

**AmpliFund** 

# AGENDA

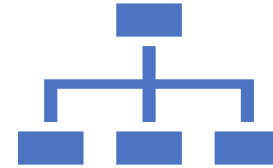
- Launch & User Role Migration
- New Security Model
- Create / Edit User
- User Personas
- Q&A

# 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)

# 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
- Access assigned at the object level
- Advanced viewing restrictions
- More robust record permissions

## 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

Account



Department



Grants

# ADVANCED RESTRICTIONS

- Budget
- Post-Award
- Salary

# RECORD PERMISSIONS

Pull from users list (rather than staff)

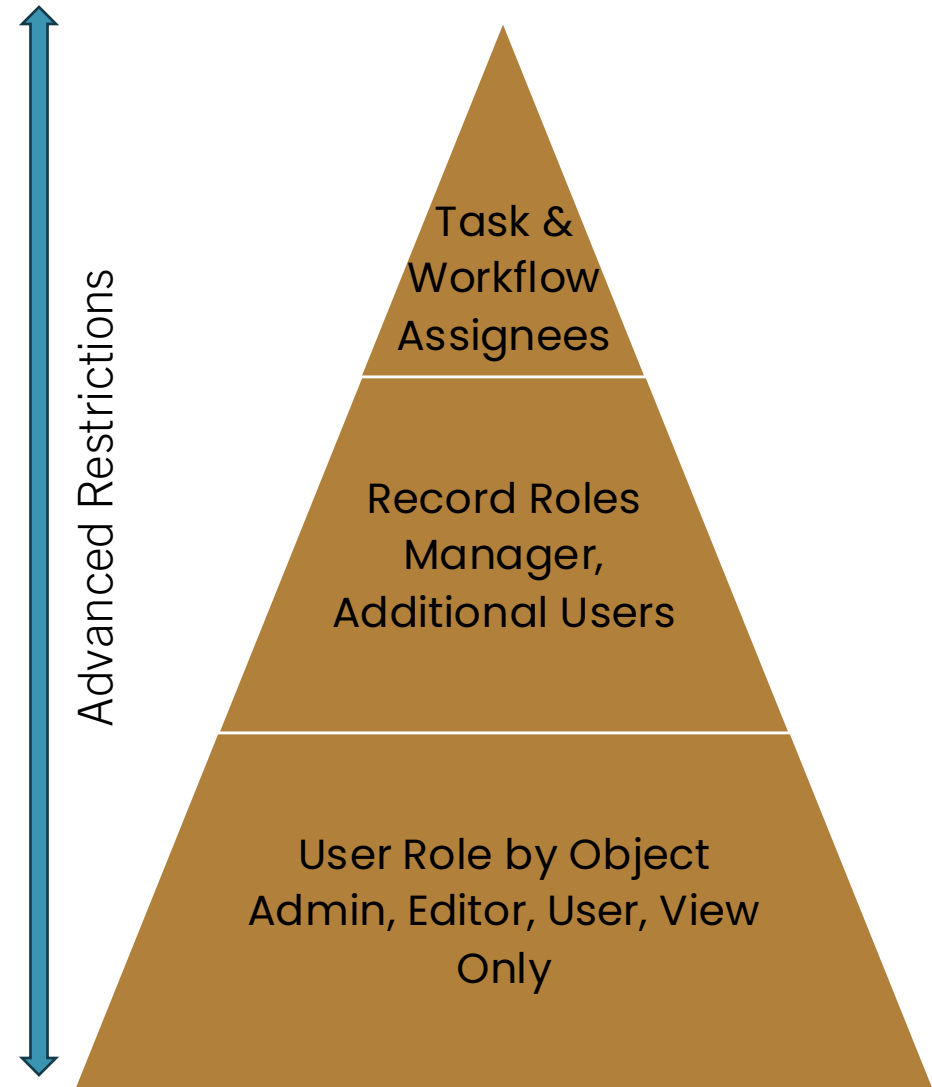
No longer required

Supports multiple selection

Revised titles for clarity

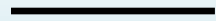
Object	Old Role	New Role
Grants	Grant Manager	Manager
Grants	n/a	Additional Users
Sub-Awards	Recipient Grant Manager	Manager
Sub-Awards	n/a	Additional Users
Budget Item	Responsible Individual	Assignee
Performance Goal	Responsible Individual	Assignee
Tasks	Responsible Individual	Assignee

**PUTTING IT ALL  
TOGETHER**





# IN PRODUCT REVIEW



Create User

Edit User

**USER PERSONA  
# 1 – RECIPIENT  
ROSE**

Rose is:

- Responsible for reporting expenses back to her funder for all awarded grants
- Manages most funder communication

Rose's user access:

- Account=Admin

**USER PERSONA  
#2 – OUTCOME  
OLIVER**

**Oliver is:**

- Responsible for reporting outcomes to his funder
- Should not have access to grant budgets or to edit expenses
- Can view grant details

**Oliver's user access:**

- Grants=user
- Advanced Restrictions=  
Budget

**USER PERSONA  
#3 – EXECUTIVE  
ERIN**

**Erin is:**

- Executive director of the organization
- Not directly involved in reporting
- Uses AmpliFund to understand progress

**Erin's user access:**

- Account=View Only

**USER PERSONA  
#4 – PRE-AWARD  
PARKER**

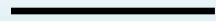
**Parker is:**

- Involved in the application process
- References award records

**Parker's user access:**

- Applications=Admin
- Grants=Editor
- Advanced Restrictions=Post-Award

# IN PRODUCT REVIEW



User persona comparison

Q & A

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