2024 Product Roadmap:
Building Efficiency, Compliance, Scalability, & Consolidation
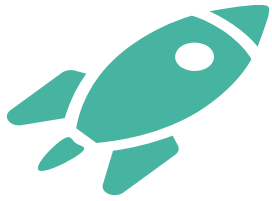
User Security
Advanced Training

AmpliFund

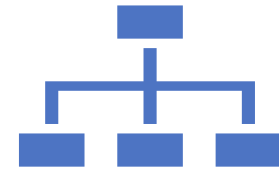# AGENDA

- Launch & User Role Migration

- New Security Model

- Questions & Examples

- Q&A

LAUNCH & USER MIGRATION

Launch date

User roles:

11/16

Automatically migrated

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

ADVANCED RESTRICTIONS

- Approvals (Payment Requests, Amendments, Reporting Periods)
- Budget
- Payment Authorizations
- Post-Award
- Salary

DEEP DIVE: RESTRICTIONS

USERS WITH THE APPROVAL RESTRICTION

- Do not see the Approve / Reject buttons on Payment Requests

- Do not see the decision option on Amendments but can Finalize Amendments

- Do not see the Reject option on Reporting Periods

- Can add comments or complete custom fields on Payment Requests/Amendments/Reporting Periods and save

- Supersedes Record level assignment

USERS WITH THE BUDGET RESTRICTION

- Do not see the pre/post-award budget option

- Do not see the budget template in the opportunity settings or applicant portal

- Do not see the expense module or budget / expense related reports

USERS WITH POST-AWARD RESTRICTION

- Do not see the Post-Award tab

- Do not see Post-Award Reports including Grant Budget Variance, Performance Plan Detail/Summary, Expense Detail, Post Award Status

- Can interact with tools and potential custom forms / fields on grants/awards based on user level

DEEP DIVE: KEY USER ACTIONS

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CREATING CUSTOM REPORTS

- Admin

- Editor

CREATING GRANTS

- Grants Admin

- Department Admin

CREATING AWARDS

- Awards Admin

- Department Admin

- Assigned via Workflow action

EXPENSES

- Import: Admin on an object

- Entry:

  Grants User

  Department User

  Budget Assignee

Q & A